

MARION 2015:

A Report to the Town of Marion Board of Selectmen

Final Report



Prepared by



CENTER FOR POLICY ANALYSIS
UNIVERSITY OF MASSACHUSETTS
DARTMOUTH

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Board of Selectmen
Town of Marion
2 Spring Street
Marion, MA 02738

Dear Selectmen:

The Marion 2015 Task Force is pleased to present its final report and recommendations to the Board of Selectmen. The Marion 2015 Task Force was officially charged on March 9, 2004 by the Board of Selectmen with developing:

“...a 10-Year Plan for the Town of Marion that identifies a consensus vision for how we want our town to look in ten years and provides a guide for getting there.”

It was stipulated that the ten-year plan would be “a continuation of prior planning efforts” that built upon the goals established by the 1996 Growth Management Committee and the subsequent planning efforts of other town committees and departments. The Center for Policy Analysis at the University of Massachusetts Dartmouth was retained to assist the Task Force by facilitating its meetings, collecting and analyzing data, conducting any necessary surveys, and preparing the final written report.

In reviewing previous planning efforts, the Task Force found that most of the recommendations proposed by the Growth Management Committee in 1996 have been implemented over the last ten years and that these actions have been generally successful in preserving Marion’s quality of life, but the success of these actions continues to make Marion an attractive residential community, which in turn exacerbates the growth and change that is often described as exurbanization. Consequently, the Task Force recommends that a number of additional actions be taken over the next ten years to preserve the town’s quality of life.

The list of recommendations in our report is an ambitious undertaking for any town, but we emphasize that implementing these recommendations is conceived as a long term ten year process and not as a one or two year project. We also note that since the Board of Selectmen has the primary responsibility for implementing many of these recommendations the Selectmen may chose to assign some of these tasks to other groups working under their supervision.

We wish the Board of Selectmen success in their future endeavors.

Carl Ribeiro, Chair, Marion 2015 Task Force

Chris Bryant, Member

Jack Dolan, Member

Tom Magauran, Member

Ruth Olson, Member

David K. Pierce, Member

John Rockwell, Member

Andrew J. Santos, Member

Missy Sittler, Member

EXECUTIVE SUMMARY

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The final report is divided into five sections that discuss:

- I. the purpose of the study,
- II. the methodology and plan of the study,
- III. the challenges and goals that emerged from the Task Force’s analysis,
- IV. a list of actions to meet these challenges and to preserve the town’s character as an affordable, historic, seaside community, and,
- V. a list of items remaining from the 1996 Growth Master Plan.

Methodology

The Marion 2015 Task Force began meeting on a bi-monthly basis on March 9, 2004 from 7:00 – 9:00 pm. The Task Force established an initial work plan that was followed with only minor additions and modifications, although the original 12-month schedule proved insufficient to complete the Task Force’s work. The plan of work outlined at the Task Force’s first meetings called for the following:

1. Documents review and review of the prior and current planning work of other town organizations (public and private),
2. Editorial meetings to inform public of the Task Force’s mission,
3. Interviews with town department heads, members of town boards and committees, civic group and social organization leaders,
4. Public secondary data collection (US Census, state and town data sources),
5. Identify major goals and challenges for next ten years,
6. Cable television presentation of survey results to initiate public discussion,
7. Primary data collection through resident survey,
8. Primary data collection through survey of local businesses,
9. Identify action items,
10. Prepare draft and final report.

The objectives defined the Marion 2015 Task Force build upon and only slightly modify the objectives established by the Marion Growth Management Committee in January of 1995. The Task Force found that the underlying town vision identified by the Growth Management Committee at that time has not changed substantially in the intervening 10 years. This conclusion is confirmed by the results of the community and business surveys commissioned by the Task Force and by the many interviews conducted with town officials and citizens over a two year period (see Section 2.00). In reviewing previous planning efforts, the Task Force found that most of the recommendations proposed by the Growth Management Committee in 1996 have been implemented over the last ten years and that these actions have been generally successful in preserving Marion's quality of life, but the success of these actions continues to make Marion an attractive residential community, which in turn exacerbates a pattern of growth and change that is described in the report as exurbanization.

The Marion 2015 Task Force has also reviewed numerous planning documents and reports produced by the Town's departments and committees. It has interviewed elected and appointed town officials, local business owners, and representatives of various civic groups. The Task Force conducted a mail survey town residents and a mail survey of local businesses. The Task Force distilled the major topics and themes to emerge from the interviews and surveys. The Task Force subsequently attempted to "quantify" these issues by reviewing public data on a variety of topics, including the town's demographic composition (e.g., age, income, educational attainment, and ethnicity), employment and business growth, time to commute, economic base, property values, housing prices, etc. The Task Force also finds that most of the concerns reported by citizens, business owners, and town officials are justified based on its analysis of supporting data. The supporting primary and secondary data is included in the final report.

Challenges and Goals

The Task Force concludes that the major challenges facing Marion are a product of "growth and change." The major components of this growth and change consist of population change, economic change, cultural change, and management change. The major community goal identified by the Task Force is to preserve the town's quality of life in the context of adjusting to these changes. To preserve that quality of life, the town will have to take additional actions that maintain its affordability, diversity, character, and tax stability:

A. GROWTH AND CHANGE	B. QUALITY OF LIFE
I. Population Change	I. Affordability
II. Economic Change	II. Diversity
III. Culture Change	III. Town Character
IV. Management Change	IV. Stable Taxes

Recommendations and Action Items

The Task Force found that most of the recommendations proposed by the Growth Management Committee in 1996 have been implemented over the previous ten years. These actions have been mostly successful in preserving Marion's town character, but the success of these actions continues to make Marion an attractive residential community, which in turn exacerbates the pressures of exurbanization. Consequently, while the Task Force embraces the vision and objectives identified by the Growth Management Committee in 1996, it recommends that a number of additional actions be taken over the next ten years to preserve Marion as an affordable, diverse, and historic seaside community. To achieve this goal, while meeting the challenges of the next decade, the Task Force is proposing 59 action items and notes that 5 items from the 1996 *Growth Master Plan* remain incomplete at the present time. The Task Force recommendations are designed to preserve the town's affordability, diversity, character, and fiscal stability.

The Task Force recommends several actions for the purpose of encouraging and promoting the development of **affordable housing** for families, long-time residents, the elderly, moderate income households, downsizers, returning Marion natives, and municipal employees. These actions include:

1. Creating or obtaining an inventory of existing land and buildings available for affordable housing development.
2. Exploring options for gifting property and houses to the Town of Marion for affordable housing.
3. Implementing the Marion Housing Plan, including implementation of the Marion Housing Trust.
4. Developing an affordable mixed-use by-law and "mini-master plan" for the village center and for other nodal areas using smart growth guidelines. The nodal areas include the intersections of Rt. 6 and Rt. 105, Rt. 6 and Converse Rd., Route 6 and Point Rd. and the village center. The mini-master plan and by-law should encourage "mini-village" mixed use development.
5. Expanding Little Neck Village.
6. Exploring options for privately owned elderly housing, e.g. condominiums, assisted living facilities, and a nursing home that will provide a continuum of care and services, but with the stipulation that private developments must include an affordability component.
7. Researching potential financing mechanisms to supplement affordability.
8. Exploring and promoting coalitions to finance affordable housing through town, private developer, and non-profit ventures.

9. Strengthening and prioritizing cluster zoning, including multi-family/cluster zoning and mixed use zoning, including a review of existing density requirements (e.g., a density bonus review).
10. Identifying and promoting existing affordability programs and educating residents about these programs, (e.g., heating assistance, property tax abatements and exemptions, rental deduction on state income tax, earned income credit, etc.).
11. Exploring options for municipal town employee housing.
12. Maintaining and updating the town website with information about town resources and programs, such as heating assistance, property tax abatements and exemptions, the rental deduction on state income tax, and the earned income credit, etc.

The Task Force recommends several actions designed to create a business climate that encourages **business diversification**, including:

1. Examining zoning mechanisms that will enhance village and waterfront business vitality.
2. Exploring mechanisms to take advantage of marine and village businesses.
3. Facilitating the development of bed and breakfasts.
4. Developing a plan for business growth and business location within the town of Marion.
5. Recruiting and encouraging “after 5:00 pm” businesses, e.g., restaurants, small retail shops, etc.
6. Improving and expanding resources to Council on Aging and other services for an aging population.
7. Assisting in the development of a business support network that will encourage Marion businesses to come together in a business association-type entity.

The Task Force recommends additional actions aimed at protecting the town’s character by preserving its **historic seaside quaintness**, creating a **Harbor and Waterfront Masterplan**, preserving **open space**, fostering **volunteerism**, and enhancing relations with **Tabor Academy**. The proposed actions include:

1. Ensuring that commercial design standards exist and/or are created to preserve the character of the town.
2. Designating critical areas of development, and studying the potential uses and designs of these areas to control future development. Planning should focus on

mixed use development – affordable housing and a mix of small businesses that serve the community rather than “fly on-fly off” traffic.

3. Reviewing a study of “traffic calming,” especially on Route 6 and the proposed nodal areas, including alternative methods of transportation, such as bike paths, single lane areas, and turn lane areas.
4. Getting ahead of the potential negative development consequences by:
 - a. Developing mechanisms to preserve historic structures, including possible use of a demolition delay bylaw or redefining demolition/alteration.
 - b. Slowing mansionization of the village by limiting the size and scope of developments for consistency within the area.
 - c. Enforcing the 40% impervious lot coverage by-law – for all lots, not just non-conforming ones -- by fixing the definition of an impervious surface.
 - d. Ensuring flood plain development is adequately restricted to maintain public safety.
5. Creating a village center protection district that promotes mixed use development, such as marine services, marine access, small retail, and affordable housing.
6. Exploring strategies for optimizing parking in the village.
7. Developing zoning and special permits to encourage marine and boating services/amenities that attract seasonal boaters.
8. Encouraging development that provides a significant public benefit, such as public marine access, and that protects the economic vitality of the village center.
9. Studying the importance of build out on taxes, roads, wastewater treatment, schools, municipal services, including the development of accurate measurement data.
10. Studying and refining the existing build-out analysis.
11. Creating a Harbor and Waterfront Master Plan for Marion that recognizes Marion’s harbor as one of the town’s most valuable resources as a source of revenue, as a major recreation asset, and as a major aesthetic asset.
12. Exploring successful models implemented in other coastal towns for opening up marine amenities to public use with an emphasis on serving Marion residents.
13. Reconfiguring and optimizing access and use of the current field.
14. Creating a community boating area that will primarily serve local residents.

15. Studying and managing nitrogen sensitive embayment denigration and the environmental impacts of marine uses on the harbor.
16. Exploring methods to leverage the value of waterfront property to support town needs.
17. Requesting that the Planning Board and Harbormaster examine the proliferation of docks and piers.
18. Promoting the management and protection of open space for preservation and for possible future town uses.
19. Coordinating formal meetings once or twice per year among the Open Space Committee, Sippican Land Trust, Planning Board, Community Preservation Committee, and Board of Selectmen and developing a mechanism for enhanced communication between private and public land use bodies.
20. Creating a land use plan for municipal infrastructure needs.
21. Creating more passive versus active recreational amenities for seniors and greater leisure activities for all age groups.
22. Exploring property tax credits for elderly residents, who volunteer to assist in providing town services.
23. Promoting and communicating a list of volunteer opportunities, including use of town website.
24. Developing communication with the business community regarding fire, EMS, and Harbormaster volunteer issues.
25. Communicating better with town residents and businesses about the need for volunteers, including the increasing pressures of maintaining services without volunteers, the solicitation of possible solutions, and the potential long term expenditure impacts, with the goal that all residents and businesses are better informed and able to make better decisions.
26. Creating a joint town-gown committee on Tabor Academy to open the lines of communication about problems, issues, and opportunities facing the Town and Tabor.

The Task Force recommends additional actions designed to maintain **stable taxes** and fiscal stability in the Town of Marion. The proposed actions include:

1. Identifying and examining best practices for government structure, organization, and operations, with particular emphasis on:
 - a. volunteer and on-call fire, EMS, and Harbormaster operations,
 - b. general government organization,
 - c. a charter commission, including examination of the lines of intra-organizational and inter-governmental communication,
 - d. the Department of Public Works,
 - e. elected boards and commissions versus appointed boards and commissions,
 - f. elected versus appointive positions generally,
 - g. the fiscal impact of Planning Board and zoning decisions,
 - h. opportunities for regionalization.
2. Establishing a town committee, board, or task force to analyze all existing assets, buildings, and property that are owned by the town and to examine the potential re-use by other departments, including sharing or coordinated development of multi-department buildings, and the possible sale of town buildings.
2. Ensuring that needed maintenance for town facilities is budgeted and completed on a regular schedule.

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1.00 PURPOSE OF THE STUDY

There are 38,967 general purpose local governments in the United States and eighty-two percent (82%) of these governments serve populations of less than 10,000 (US Census 2002, 2, 8).¹ Nationally, many small towns have been growing rapidly as residents leave established cities in search of a better quality of life, good schools, low crime, and high rates of municipal service delivery without onerous tax burdens. This process of “exurbanization,” which is often known in the popular lexicon as “urban sprawl,” has produced a complex landscape composed of small towns, very low density subdivisions, estates and manufactured homes, and farms (Davis et al. 1994; Pierce and Johnson 2006).² Exurban development converts active farms and forests into low density land uses.

1.10 THE CHALLENGE OF EXURBANIZATION

Exurbanization typically generates fewer local government revenues than it costs to serve (Burchell et al. 2002). At the same time, it exacerbates pressure on the transportation system, because population densities are too low to support anything but automobile travel, especially single occupant vehicle trips, while exurbanites have demonstrated a remarkable willingness to commute long distances in their cars regardless of whether or not rail service is available (Sanchez and Nelson 1997). Despite the problems it poses for open space preservation, public services, fiscal impacts, and transportation systems, exurbia emerged as one of the fastest growing landscapes in the 1980s and, by the 1990s, exurbia grew faster and added more people than urban, suburban, or rural landscapes. In the 1990s, the exurban population grew by 17.8% nationally and absorbed nearly a third (31.8%) of the country’s new population growth (Nelson and Sanchez 2005).

Many of the towns in Southeastern Massachusetts exemplify the national trend toward exurbanization with all of its attendant challenges (Barrow 1998).³ Since 1960, Southeastern Massachusetts has been adding about 10,000 new residents each year, resulting in a fifty percent (50%) population increase over the last four decades. Population growth has produced an additional 3,500 housing units per year, 27,650 additional vehicles trips per day, the consumption of an additional 710,000 gallons of water each day, and increases in public school enrollments of 2,157 students per year. To accommodate this growth, the region has been developing 4.7 square miles of vacant land annually for the past 30 years. Moreover, new transportation improvements, such as commuter rail and upgrades to Routes 3, 24, and 44, are attracting more residents, particularly Boston and Providence commuters, to the region.

¹ General purpose local governments include towns and townships, counties, and incorporated cities. There are 16,504 towns and townships located in 20 New England, Mid-Atlantic, and Midwestern states. There are 48,558 special district governments, including independent school districts (13,506) and various types of public authorities (35,052).

² The term “exurb” was coined by Auguste Comte Spectorsky (1955). The term is generally used to describe prosperous residential areas beyond the suburbs of a city. Exurbs are made possible by the construction of high speed limited access highways (e.g., I-195 and I-495), which allow small towns and rural areas to become dormitory communities for an urban area (e.g., Boston, New Bedford, Providence).

³ Southeastern Massachusetts includes the 45 cities and towns in Bristol and Plymouth Counties.

In fact, population growth and residential development have been uneven within the region, especially within the South Coast area that extends from Seekonk to Wareham along I-195 and includes the Town of Marion.⁴ The populations of the Cities of Fall River and New Bedford actually declined by 6.5% (-12,969) between 1970 and 2000, while the SouthCoast's suburban and exurban towns experienced population growth of more than forty-one percent (41.1%) during the same period. Although the SouthCoast's two cities account for 53.7% of the area's population, they issued only 9.4% of the building permits for new single-family housing units from 1993 to 2003 (SRPEDD 2004a). In contrast, the SouthCoast's suburban towns with 46.3% of the area's population issued 80.6% of all building permits for new single family housing units over the last decade. The area's uneven growth pattern is putting pressure on the physical infrastructure, school systems, and administrative capacities of many local governments.

These challenges were the stimulus for "The Visions 2020 Task Force" convened in 1998 by the three regional planning agencies serving municipalities in Southeastern Massachusetts (SRPEDD 2004b). The purpose of the Task Force was to develop comprehensive regional land use and policy recommendations to guide local policymakers over the next two decades. In its final report, *Southeastern Massachusetts Vision 2020: An Agenda for the Future*, the Task Force recommends that Southeastern Massachusetts embrace a development strategy that emphasizes urban redevelopment, the preservation of open space and agricultural lands, and the preservation of historic districts, waterfronts, and small town villages. The Task Force recommends that each town or city in the region adopt a set of goals, policies, and administrative institutions consistent with this vision, but tailored to the objectives, needs, and capacities of each municipality.

1.20 MEETING THE CHALLENGE OF EXURBANIZATION

The first *Master Plan* prepared for the Town of Marion in 1965 anticipated the problems of exurbanization by pointing out at even this early date that the most significant challenge facing residents and town officials would be managing "considerable growth during the next twenty-five years" (Shurcliff & Merrill 1965, c).

The 1965 *Master Plan* predicted that future population increases would generate new land use and development pressures for the town. This prediction was repeated in the Town's 1974 update to the original *Master Plan*, which was conducted by the Southeastern Regional Planning and Economic Development District (SRPEDD) under the direction of the Town's Planning Board. The 1974 update warned that development pressures in Marion would likely accelerate due to the construction of Interstate Highway 195, which cuts a swath through the middle of the town and makes for easy connections to I-495 (Wareham), Route 25 (Cape Cod), Route-140 (New Bedford), and Route 24 (Fall River).

Despite these growth and development pressures, Marion has successfully maintained large open spaces, a beautiful coastal landscape, a historic village center, and

⁴ The SouthCoast area of Southeastern Massachusetts is defined as Acushnet, Dartmouth, Fairhaven, Fall River, Freetown, Lakeville, Westport, Marion, New Bedford, Rochester, Somerset, Swansea, Wareham, and Westport.

excellent public schools that continue to make the town an attractive residential location with an appealing quality of life. The Town of Marion has been exceptionally pro-active in its effort to meet the challenges posed by earlier Master Plans by commissioning several citizen and consultant reports over the years to help plan various areas of town development. Burk Ketcham and Associates (1988) prepared a *Marion Land Use Plan* for the Planning Board, which addressed the preservation of natural resources, land use zoning, traffic and parking, the provision of community facilities, and public utility capacity.

However, in lieu of another Master Plan update, the Marion Board of Selectmen and the Planning Board established a “Marion Growth Management Committee” in January 1995, which submitted *A Report of Planning Recommendations to the Board of Selectmen and the Planning Board* in October of 1996. The Committee’s report established a 10-year growth management plan guided by five major goals that emerged from a “Community Planning Day.” These goals were to:

1. Preserve the natural and historic character of the community, including the preservation of the village center and improving public access to the harbor.
2. Maintain the social and economic diversity of the Town by fostering small businesses, a variety of housing options, mixed uses, and a sense of community.
3. Develop a more balanced economic base for the Town by encouraging quality business development that is clean, provides jobs to local residents, and enhances the town’s tax base.
4. Preserve open space and improve public access to open space,
5. Maintain an efficient and responsive government that is capable of implementing new zoning by-laws and infrastructure improvements necessary to achieving these goals.

The report recommended 56 action items that included a variety of proposed zoning by-laws and other management guidelines to control future residential and business growth, while supporting the development of high quality businesses that provide services or employment to residents and that are compatible with the town’s natural and historic character. The Town of Marion implemented many of these goals over the next years through zoning and by-law changes. However, it also launched major initiatives in the areas of open space and recreation, town management, infrastructure improvement, and housing.

The concerns with open space and recreation were addressed in a report prepared by the Marion Open Space Planning Committee (1998). The *Marion Open Space and Recreation Plan, 1998-2003*, established the goal of permanently protecting twenty-four percent (24%) of Marion’s land as open space by the year 2003, with most of the protected land to be acquired by the Sippican Land Trust and lesser amounts by the Town.

The *Marion Open Space and Recreation Plan* was updated in 2005 (Beals and Thomas 2005). The update found that the percentage of land in Marion that is permanently protected as open space increased from 9 percent in 1998 to 23 percent in 2005. In 2005, the total amount of protected land in the Town was approximately 1,406 acres. This includes approximately 844 permanently protected acres of conservation land managed by the Conservation Commission and the Open Space Committee, 47 acres of permanently protected recreation land managed by the Recreation Committee, 4.5 acres of protected land managed by the Town of Marion's Department of Public Works, and 514 acres of state owned land that is primarily managed by the Department of Fish and Game. In addition, there are approximately 556 acres of land in Marion that have conservation restrictions. The Town adopted the Massachusetts Community Preservation Act in 2005, which should further advance the goals established by the *Open Space and Recreation Plan*.

In addition, the Town of Marion Planning Board requested the Buzzard's Bay Project (BPP) to perform a build-out analysis in 1999 based on the town's existing zoning by-laws. The BPP provides technical and planning assistance to communities in the Buzzard's Bay watershed on issues related to surface water quality. In 2004, the Marion 2015 Committee requested an update of that analysis.

The build-out analysis projects the final build-out at 4,657 lots, which is an increase of 2,143 from the existing number of developed lots (see Table 1). More than three-quarters of this potential growth is residential (75.9%), while 24.1 percent is business, industrial, or marine development. Importantly, the final build-out numbers may change over time depending on actions taken by the Town, such as requiring larger lot sizes or changing zoning regulations.

Table 1
Build-Out Analysis

	Existing	Final Build-Out	Growth
Residence A	247	363	116
Residence B	550	697	147
Residence C	928	1,307	379
Residence D	564	1,542	978
Residence E	26	34	8
General Business	94	275	181
Marine Business	32	88	56
Limited Business	58	114	56
Limited Industrial	15	237	222
Total	2,514	4,657	2,143

However, in addition to the land use concerns that accompany population growth, the report and recommendations of the Marion Growth Management Committee (1996, 21) also called attention to the fact “that town services must grow in proportion to the population growth of the Town.” Population growth not only creates land use pressures, it generates additional demand for town services, such as water supply, sewer connections and wastewater treatment capacity, police and fire protection, emergency medical response, new streets and street maintenance, solid waste disposal, school services, and recreational facilities. Town governments are also responsible for conducting an array of building, plumbing, gas, electrical, sanitary, and septic inspections as well as zoning and code enforcement. Many of these demands increase proportionately with population growth and business development.

Furthermore, in addition to increasing their delivery of “traditional” municipal services to meet population growth, town governments throughout Massachusetts have assumed new responsibilities and functions over time in response to citizen demand and because of new state and federal mandates (MMA 1996). For example, town governments have assumed responsibility for administering state and federal programs related to veterans, the elderly, affordable housing, historic preservation, recreation, cultural affairs, and education. Town governments must comply with increasingly complex state regulations and mandates, including more stringent financial reporting, grant writing and program evaluation, and a wide range of technical environmental regulations related to wetlands protection, solid waste disposal, water supply management and water treatment, septic systems, sewerage, and the operation of wastewater treatment plants. The responsibilities of what were formerly part-time police departments and volunteer (call) fire departments have become round-the-clock professional operations in many towns that have expanded to include emergency medical services, crime and fire prevention, oil spill and toxic chemical response, emergency management response, and anti-terrorism preparedness. These functions often include, or are coordinated by, those responsible for harbor and marine resources management. The state and federal governments have also promulgated numerous anti-discrimination regulations with respect to gender, race, disability, and sexual orientation that affect the operations of municipal government.

In addition, the physical plant of many municipalities is inadequate to accommodate the new demands placed on town government. Century-old town halls often lack sufficient office space, storage room, modern security controls, access for the disabled, electrical capacity, and hardwired computing networks. Technology has also placed increased pressure on towns to deliver services in new ways. Computers and up-to-date software can radically change the way local government operates, while increasing citizens’ expectations for an efficient, rapid, and effective response to their many demands on government, such as online payment of taxes and e-filing of various forms. In short, the scope, complexity, and technical demands of managing town government have changed considerably since most Massachusetts towns were incorporated more than a century ago as part-time volunteer governments (MMA 1996).

Like many towns in Massachusetts, Marion managed incremental increases in service demand, and the expansion of municipal functions, with a highly decentralized

and fragmented form of municipal management that was literally designed for small rural communities of the sort that proliferated in New England from the late 1700s to the mid-nineteenth century. However, as the scope and complexity of the demands on town government continue to increase, this traditional municipal management structure has often responded to long-term challenges with short-term *ad hoc* solutions.

It is often the case that an individual or department is temporarily or informally assigned responsibility for a new function that gradually becomes a permanent part of that individual's or department's responsibilities. Functional accretion may also occur because a new function arises that town government is not otherwise prepared to meet in the short time frame demanded and an individual or department will take the initiative in that area simply to "get the job done."⁵ In many cases, where there is insufficient management capacity, important functions go unattended for long periods of time, which leads to management drift.

Management drift occurs when significant functions go unattended in government, when the functions of government lack coordination or direction, and when the technical demands of government outstrip the technical capacities of town officials. Management drift is often compounded in New England town governments by the numerous elective department heads, boards, and commissions, which become independent "policy silos" without common direction or coordination. Most towns in Massachusetts vest responsibility for many important functions in part-time volunteer boards or commissions (e.g., planning, health, conservation, assessors) that often do not have adequate clerical support or professional staff. Moreover, many towns do not have a full-time professional building inspector, planner, conservation agent, or code enforcement officer despite rapid residential and business development. Most towns do not have a management information services department even though electronic communications and data storage are becoming common in government.

Consequently, as an additional follow up to the report and recommendations of the Marion Growth Management Committee, the Marion Board of Selectmen commissioned the University of Massachusetts Dartmouth Center for Policy Analysis to conduct a study of municipal management in the Town of Marion in June of 1998. The purpose of that study was to develop recommendations that would improve the management structure and functional responsibilities of town government. The report made seven recommendations, but the most important recommendation was to replace the Executive Secretary position with a Town Administrator.

The Town also addressed its pressing infrastructure needs in three plans released between 2001 and 2003. The town's Wastewater Planning Committee released a *Facilities Plan* in May 2001 that outlined Marion's plans for upgrading its wastewater treatment plant and sewage collection system. The plan's goal was to extend and upgrade the municipal wastewater system in ways that provide the best long-term

⁵ For example, it is quite common in Massachusetts for Town Accountants to evolve into the town's information services manager by default simply because their offices are the first to computerize and because other departments must be linked into their accounting and financial management software.

reliability and environmental impact at the least cost to the users. The plan was sent to the State as part of a \$13 million proposal for a mandatory upgrade of the Town's wastewater treatment system.

In 2002, the Department of Public Works initiated its *Annual Water Capital Improvement Program* in conjunction with the Town's engineering firm and the town water sub-committee. The department is exploring additional water supply options and the feasibility of those options. This program focuses on the problems of water storage, distribution, and supply, including the need to repair existing water tanks, the construction of a new water tank, the building of a joint filtration plant with other towns, and a distribution needs program to improve the Town's fire flows.

Given the town's growing need for capital improvements in a variety of areas, the Marion Finance Committee adopted a formal *Capital Plan* in July 2003. This plan identifies capital spending items in Marion from 2004 to 2008 and estimates the impact of this spending on the town's debt ratio over the next 10 years. The *Plan* also outlines the required debt service from 1990 to 2009 and lists capital projects in the town from 2001 to 2015 based on projected needs.

Finally, the Marion Housing Committee completed an *Affordable Housing Plan* that was approved by the Marion Board of Selectmen at their September 21st, 2004 meeting. The *Plan* was submitted with a cover letter dated September 10th, 2004 to the Massachusetts Department of Housing and Community Development (DHCD) for review and approval. DHCD responded on November 17th, 2004, asking that the Town make several minor additions and modification. Following several iterations, final approval was received at the end of February 2005.

The Marion *Affordable Housing Plan* is designed to meet the needs of Marion residents of all ages and financial situations, while satisfying the requirements of M.G.L. Chapter 40B. While the plan seeks to preserve housing for the elderly and for first-time home owners, its main goal is to achieve and maintain the state's mandate that ten percent (10%) of the Town's year-round housing will be to households earning 80 percent or less of the area's median household income.

1.30 THE MARION 2015 COMMITTEE

In many ways, Marion's success at managing growth and meeting the challenges exurbanization have enhanced its attractiveness as a residential location, while business development along the I-495 corridor and skyrocketing home prices in the Greater Boston area continue to pull much of the state's population south. Indeed, by 2005, nearly all of the action items contained in the Growth Management Committee report, as well as many of the recommendations included in other reports and plans, were being effectively implemented by the Board of Selectmen, the Planning Board, and other town departments.

Consequently, the Marion Board of Selectmen concluded that it was time to update the Growth Management Plan. In March 2004, the Board of Selectmen appointed the Marion 2015 Task Force to assist them in developing *Marion 2015: A Town Plan*. The members of the Task Force were:

Carl Ribeiro, Chair

Chris Bryant
Tom Magauran
David K. Pierce
Andrew J. Santos

Jack Dolan
Ruth Olson
John Rockwell
Missy Sittler

The Marion 2015 Task Force was officially charged by the Board of Selectmen with developing:

"...a 10-Year Plan for the Town of Marion that identifies a consensus vision for how we want our town to look in ten years and provides a guide for getting there."

It was stipulated that the ten-year plan would be "a continuation of prior planning efforts" that built upon the goals established by the 1996 Growth Management Committee and the subsequent planning efforts of other town committees and departments. Under ideal circumstances the Marion 2015 Task Force would successfully synthesize the individual plans of individual boards and committees, while identifying any possible conflicts in the priorities and goals of competing plans. The Center for Policy Analysis at the University of Massachusetts Dartmouth was retained to assist the Task Force by facilitating its meetings, collecting and analyzing data, conducting any necessary surveys, and preparing the final written report.

2.00 METHODOLOGY & PLAN OF THE STUDY

The Marion 2015 Task Force began meeting on a bi-monthly basis on March 9, 2004 from 7:00 – 9:00 pm. The Task Force established an initial work plan that was followed with only minor additions and modifications, although the original 12-month schedule proved insufficient to complete the Task Force’s work. The plan of work outlined at the Task Force’s first meetings called for the following:

1. Documents review and review of the prior and current planning work of other town organizations (public and private),
2. Editorial meetings to inform public of the Task Force’s mission,
3. Interviews with town department heads, members of town boards and committees, civic group and social organization leaders,
4. Public secondary data collection (US Census, state and town data sources),
5. Identify major goals and challenges for next ten years,
6. Cable television presentation of survey results to initiate public discussion,
7. Primary data collection through resident survey,
8. Primary data collection through survey of local businesses,
9. Identify action items,
10. Prepare draft and final report.

2.10 DOCUMENTS REVIEW

The Task Force initially assembled a library of documents so that members could familiarize themselves with the Town’s planning history. These documents were available to members of the Task Force throughout its deliberations and provided a starting point for the Task Force’s subsequent work. The documents reviewed by members of the Task Force members include:

- Marion Growth Management Committee, *A Report of Planning Recommendations to the Board of Selectmen and the Planning Board* (January 1996),
- Marion Open Space Planning Committee, *Marion Open Space and Recreation Plan, 1998-2003* (1998),
- Marion Board of Selectmen, *Municipal Management for the Future: A Report to the Marion Board of Selectmen* (Center for Policy Analysis, October 1998).
- Wastewater Planning Committee, *Facilities Plan* (May 2001), Department of Public Works, *Annual Water Capital Improvement Program – Department of Public Works* (2002),
- Marion Finance Committee, *Capital Plan* (July 2003),

- Old Rochester Regional School District, *Strategic Direction, 2003-2008* (2003)
- Marion Housing Committee, *Affordable Housing Plan* (September 2004).

2.20 KEY INFORMANT INTERVIEWS & PUBLIC DATA COLLECTION

The Task Force developed a 7-item questionnaire based on its documents review and subsequent deliberations. The questionnaire was mailed to town department heads, town committees, civic groups, social clubs, and other organizations for the purpose of incorporating their insights and planning initiatives into the 2015 process. The seven questions were:

1. What is your organization's mission?
2. Please identify any completed or current planning efforts undertaken by your organization.
3. What are your organization's major goals for the next 10 years?
4. What are the major issues facing your organization over the next 10 years?
5. What are the main obstacles to achieving your organization's goals over the next 10 years?
6. What other town departments or other organizations affect the ability of your organization to realize its goals?
7. Do your organization's activities have an environmental impact on the town? If yes, please explain.

The identified individuals and groups were also asked to make a presentation to the Task Force and to prepare a 2-4 page statement answering the seven questions. The Task Force met with two to three representatives of these agencies and organizations at each of its meetings from May 11, 2004 through September 6, 2004:

Conservation Commission	Marion Housing Committee
Council on Aging	Marion School Committee
Emergency Management	Open Space Acquisition Committee
Emergency Medical Service	Planning Board
Finance Committee	Police Department
Fire Chief	Recreation Committee
Harbormaster	Sippican Lands Trust
Library Trustees	Town Administrator
Marine Resources Committee	Tree Committee

Following the key informant interviews, the Task Force reviewed the major topics and themes to emerge from the interviews and then sought to “quantify” these topics and issues by reviewing the available public secondary data. Data was collected on a variety of topics, including the town’s demographic composition (e.g., age, income, educational attainment, and ethnicity), employment and business growth, time to commute, economic base, property values, housing prices, etc. Based on these sources of information, a preliminary set of goals, challenges, and strategic growth management options were devised by the Task Force.

The Center for Policy Analysis facilitated a meeting where the Task Force sought to synthesize the available information into a few key goals and challenges for Marion, while preserving a high degree of continuity with the 1996 Growth Management Plan for the next ten years. The results of this brainstorming session yield two major themes, which each had four components. The major challenge facing Marion was identified as “growth and change,” with the major components of that change consisting of population change, economic change, cultural change, and management change. The major goal identified for the Town was to preserve its quality of life in the context of these changes. To preserve that quality of life would require the town to maintain its affordability, diversity, character, and tax stability (see below):

A.	GROWTH AND CHANGE	B.	QUALITY OF LIFE
I.	Population Change	I.	Affordability
II.	Economic Change	II.	Diversity
III.	Culture Change	III.	Town Character
IV.	Management Change	IV.	Stable Taxes

2.30 RESIDENT SURVEY

The Task Force decided to “test” its initial conclusion with a resident and homeowners survey that was mailed to all registered voters (year round residents) and seasonal homeowners in the Town of Marion. This technique was selected because response rate from community surveys tends to be much higher than the number of participants in neighborhood meetings and is therefore a more reliable measure of community sentiment. The survey was mailed on March 14, 2005 to 4,088 households and 1,085 survey forms were returned to the Task Force for a response rate of 26.5%.⁶

Prior to mailing of the survey, Dr. Clyde W. Barrow, Director of the Center for Policy Analysis, taped a PowerPoint presentation, which aired several times during the week of March 14th on the local cable television station. The purpose of the presentation was to further inform Marion’s citizens of the mission, process, and initial findings of the Task Force and to emphasize the importance of returning the community survey.

⁶ The average response rate to mail surveys nationally is ten percent (10%) to twelve percent (12%).

2.40 BUSINESS SURVEY

The Task Force also solicited input from local businesses with a mail survey. The survey was mailed to all businesses listed in the Marion telephone directory compiled by the League of Women Voters. The survey was mailed in July of 2005 to 240 businesses and 44 survey forms were returned to the Task Force for a response rate of 18.3%.

3.00 CHALLENGES & GOALS

3.10 POPULATION CHANGE

There are many facets to population growth in Marion that have a wide ranging impact on the community's character and culture and on the needs that must be addressed by town government. Population growth does not merely mean that more people are living in Marion, but this growth is accompanied by population change that has both positive and negative impacts on the town. The Town has an established goal of maintaining its population diversity in terms of family size, age, economic status, and ethnicity identity, but the factors that make Marion an attractive community are making it more difficult to maintain that diversity. The town's residents value open space, recreational facilities, the natural environment, and the quality of the town's waters and bays, but these basic values are potentially threatened by a growing population without proactive policies.

Marion residents also report that they want to maintain its small town, civic minded culture, although newer residents may not feel the same connection to the town and, as time to commute increases, or employment opportunities are found outside the town, residents may be less likely to volunteer or participate in town government. Population growth also places pressures on town government as it responds to the growing and varied needs of residents. These pressures include the demand that town government provide a high level of public services and a wide range of public services, while maintaining stable budgets and taxes in a predominantly residential community. The town will have to find ways to pay for these services, while reassessing whether the town's organizational structure provides the capacity to manage growth and change.

3.11 Historical and Projected Population

Marion has a population of 5,123 (U.S. Census 2000) that is 48.0 percent male and 52.0 percent female. The town's year-round population increased by nearly seventy-eight percent (77.8%) over the last forty years from 2,881 in 1960 to 5,123 in 2000 (U.S. Census 2000). While the rate of population increase has slowed during the current decade, Marion's population is projected to exceed 5,600 by the year 2010 and 6,200 by the year 2020 (see Table 1).⁷ There has also been a slow down in the issuance of single-family building permits (see Figure 1).

Marion's population has been increasing at a faster rate than the state as a whole. For example, from 1960 to 2000, Marion's population increased by 61.9 percent, compared to 21.7 percent for the state, and it increased by 13.9 percent from 1990 to 2000 compared to 5.5 percent for the state (see Table 2 and Figure 2). From 2000 to 2020, Marion's population is projected to grow three times faster than the state as a whole – 20.2% for Marion vs. 6.5% for the state.

⁷ The Massachusetts Department of Revenue estimates Marion's 2004 population at 5,310, which projects to a decennial growth rate of approximately 7.5%.

Table 2
Population

Population and Estimates: 1960 to 2020							
	<u>1960</u>	<u>1970</u>	<u>1980</u>	<u>1990</u>	<u>2000</u>	<u>2010</u>	<u>2020</u>
Marion	2,881	3,466	3,932	4,496	5,123	5,696	6,210
Massachusetts	5,148,578	5,689,377	5,737,093	6,016,425	6,349,097	6,557,001	6,767,712

Source: U.S. Census Bureau, 1960-2000; Estimates from MISER (2003)

Figure 1
Single Family Building Permits

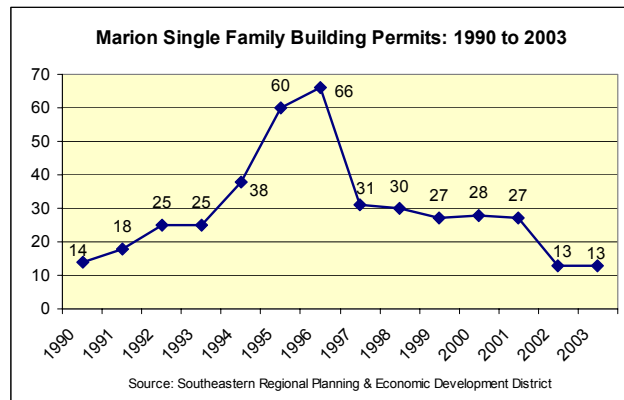
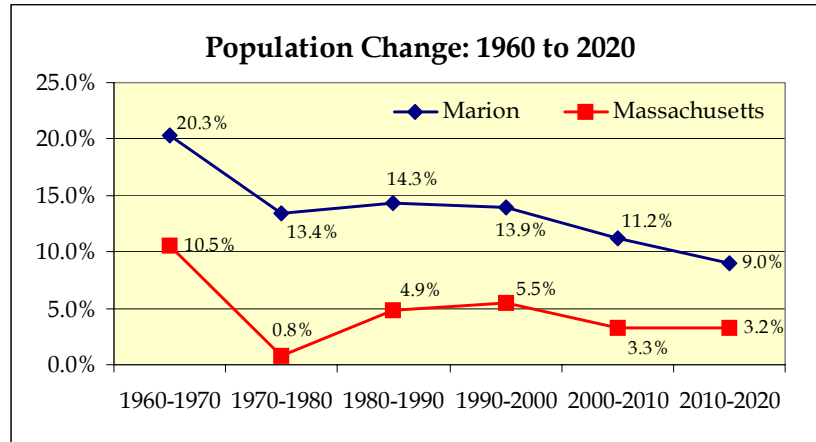


Table 3
Population Change

Population Change: 1960 to 2020						
	<u>1960-1970</u>	<u>1970-1980</u>	<u>1980-1990</u>	<u>1990-2000</u>	<u>2000-2010</u>	<u>2010-2020</u>
Marion	20.3%	13.4%	14.3%	13.9%	11.2%	9.0%
Massachusetts	10.5%	0.8%	4.9%	5.5%	3.3%	3.2%

Source: U.S. Census Bureau, 1960-2000; Estimates from MISER (2003)

Figure 2
Population Change



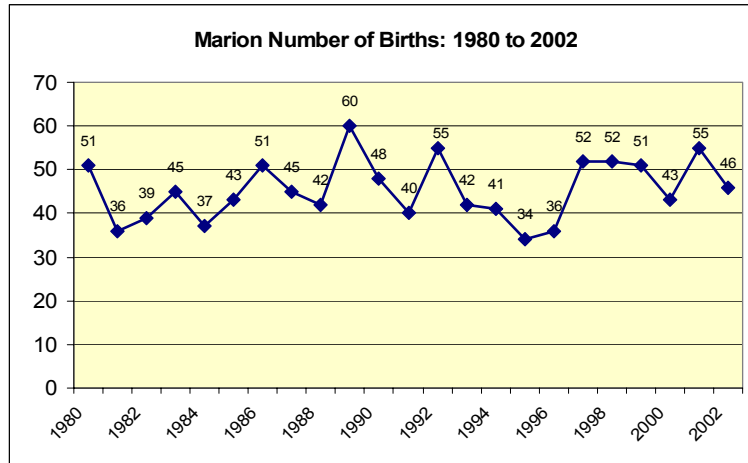
The results of the Community Survey show that Marion residents are concerned with population growth and its impact on the town. Nearly forty-three percent (42.8%) of survey respondents identify the impact of population growth as a critical issue in Marion. Residents rank population growth as the third most critical concern among twenty issues identified by respondents.

3.12 Population Analysis

3.12a Births and Deaths

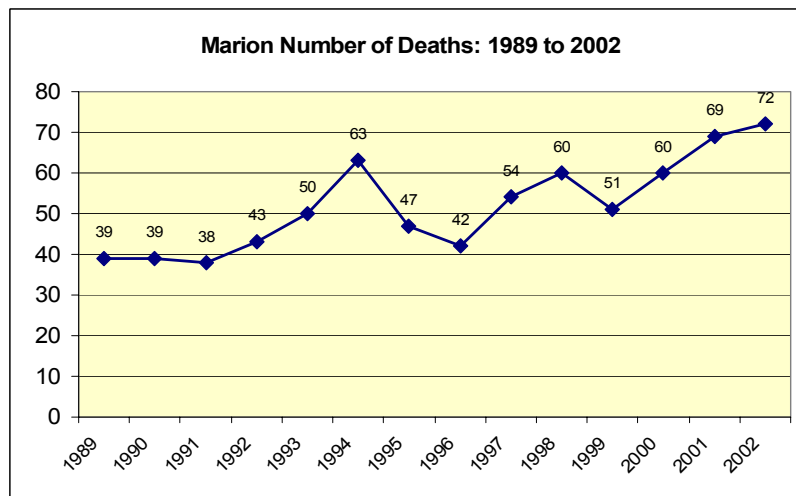
The annual number of births in Marion has been relatively consistent from 1980 to 2002, while the annual number of deaths in Marion has risen steadily since 1989. Since 1989 there have been 655 births in Marion and 724 deaths for a net population decrease of 69 among the resident population. Consequently, the town's population growth is fueled entirely by non-residents moving into town.

Figure 3
Number of Births



Source: Massachusetts Department of Public Health - Calendar Year Data

Figure 4
Number of Deaths



Source: Massachusetts Department of Public Health - Calendar Year Data

In the Community Survey, residents were asked how long they have lived in Marion. Nearly half (47.1%) have lived in Marion for more than twenty years, while more than a third (34.6%) have moved to Marion in the past ten years. The findings of the Community Survey indicate that 58.7 percent of all respondents were attracted to Marion because of “the character of the Town,” which is the second highest reason given by respondents. Open ended responses in the Community Survey suggest that the town’s “character” is generally understood to mean a small, seaside, historic village.

Table 4
Years Lived in Marion

	Frequency	Percent
< 5 years	146	13.8%
6 to 10 years	220	20.8%
11 to 20 years	194	18.3%
Over 20 years	498	47.1%

Similarly, almost a third (31.7%) of the respondents to the business survey indicate that it is very important for Marion to keep its historic seaside village character for their businesses to prosper in the future. It is clear that the town will have to find ways to balance population growth, while maintaining its current character. The approach to managing future residential development is therefore a key issue for Marion residents, since a growing population will involve the construction of new housing units.

In fact, more than half of respondents (51.1%) to the Community Survey agree that the current pace of residential development is too fast, while only 3.5 percent believe it is too slow. At the same time, Marion is subject to the state's "Chapter 40B" mandate, which requires every town to make progress toward insuring that 10% of its housing units are "affordable" as defined by the state's Department of Community and Housing Development (DCHD). Without such progress, the town risks losing the ability to manage residential development in ways that are consistent with the town's basic goals and values.

In identifying potential responses to this challenge, the survey indicates that residents are most likely to support the development of an independent living facility for the elderly (77.4% strongly agree/agree) and to favor policies that further restrain residential development (74.2% strongly agree/agree). Respondents are least likely to support residential development that is concentrated on small lots (24.7% strongly agree/agree) and restricting development to large lots (43.2% strongly agree/agree).

Population growth (and residential development) will inevitably continue to consume undeveloped land in the town. Consequently, forty-five percent (45.1%) of respondents to the Community Survey cite the loss of open space to development as a critical issue, which is the single highest percentage among the twenty issues identified by respondents. The survey also indicates that 75.9 percent of respondents support limiting development to preserve open space. Thus, it will be important for Marion officials to identify strategies that balance the preservation of open space with residential development.

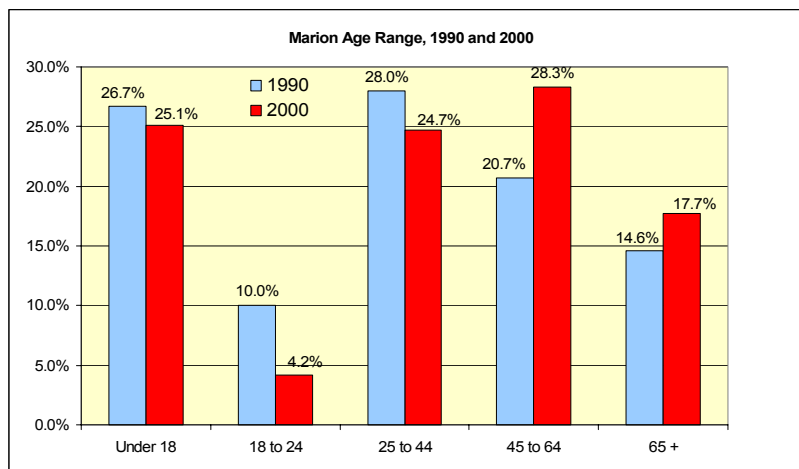
While there is a strong consensus about the need to slow the pace of residential development and to preserve open space, there are also several significant differences between long-time and more recent residents in their views of how Marion should respond to population growth and change:

- The longer a respondent has lived in Marion, the more strongly they agree that the goal of Marion should be to stay the same.
- The longer a respondent has lived in Marion, the more strongly they agree that the town should keep taxes stable, even if it means reducing services.
- A higher percentage of respondents who have lived in the town for less time strongly agree/agree that more emphasis should be placed on the library, schools, recreation facilities, and recreation programs in comparison to respondents who have lived in town for longer periods.
- Respondents who have lived in the town for a longer period of time identify elder issues, the high cost of housing (and need for affordable housing), and public transportation as more critical in comparison to respondents who have lived in town for shorter periods of time.
- A higher percentage of respondents who have lived in town for less time agree that there is “too little” land for active recreation in comparison to residents who have lived in town longer. Conversely, respondents who have lived in Marion for longer periods indicate that there is “too little” affordable housing in comparison to respondents who have lived in town for shorter periods of time.

3.12b Age

Marion’s population has grown older since 1990. The percentage of Marion residents in the under 18, 18 to 24, and 25 to 44 year age groups has declined over the last decade, while the percentage of residents in the 45 to 64 and 65 and older age groups has increased. The median age in Marion in 2000 was 42.5 years compared to 36.5 years for the state.

Figure 5
Age of Marion Residents



An aging population may require different services. For example, older residents are more likely to use passive open space instead of active open space, such as ball fields and tennis courts. The Community Survey highlights other differences with regard to age, including:

- A higher percentage of respondents age 65 years of age and older strongly agree that the goal of Marion should be to stay the same in comparison to other age groups.
- Younger respondents more strongly agree that recreation facilities should be expanded in comparison to older respondents.
- A higher percentage of younger respondents support an emphasis on funding, improving, and expanding the schools, recreation programs, and recreation facilities in comparison to older respondents.
- Lack of youth services is a more critical issue among younger respondents in comparison to older respondents.
- The older a respondent, the more likely they are to identify zoning enforcement and public transportation as critical issues.
- Younger respondents are more likely to agree that there is “too little” land set aside active recreation in comparison to older respondents.

3.12c Educational Attainment

Marion’s population is more educated than the state as a whole and its level of educational attainment has steadily increased since 1980. More than ninety-three percent (93.7%) of Marion residents age 25 and older have a high school diploma, compared to 84.8 percent statewide. A higher percentage of Marion residents possess a bachelor’s degree or a graduate degree in comparison to the state (see Figure 6,

Table 5 and Table 6). Nearly half (49.3%) of the town’s adult population has a college degree compared to one-third (33.2%) statewide.

Will an increasingly educated population be more vocal in placing demands on the local government for expanded and varied services? If so, how will these demands be met by the town?

Figure 6
Educational Attainment

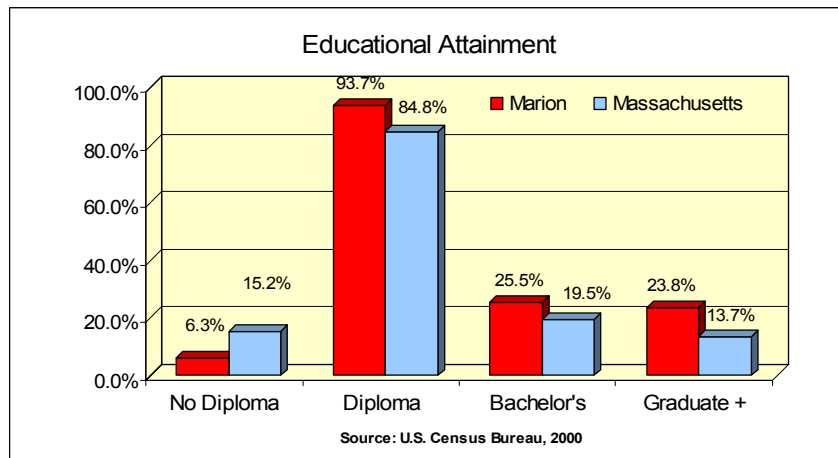


Table 5
Percent Residents with High School Diploma and Above

	1980	1990	2000
Marion	79.8%	87.1%	93.7%
Massachusetts	72.2%	80.0%	84.8%

Table 6
Percent Residents with College Education

	1980	1990	2000
Marion	30.3%	33.7%	49.3%
Massachusetts	20.0%	27.2%	33.2%

3.20 ECONOMIC CHANGE

The Town of Marion's economic base is changing as manufacturing employment declines and jobs increase in the service sectors. In 1990, manufacturing accounted for 27.0 percent of the jobs located in Marion. This percentage declined to 18.5 percent in 2004 (ES-202 Division of Unemployment Assistance). Conversely, employment in services increased from 32.5 percent in 1990 to 61.7 percent in 2004.

The structure and composition of business in Marion has a significant effect on the town's character, employment opportunities, and tax base. Thus, strategies that affect business development in the town are crucial to planning for its future. As the population grows, Marion must decide what mix of businesses it wants to promote in the town, including where business development will occur.

Marion residents are not amenable to a significant increase in commercial or industrial development at the present time. The Community Survey indicates that a large majority of respondents feel that there is "enough" industrial (73.2%) and commercial (72.6%) land use in the town. Residents are least likely to support large scale industrial or commercial developments or widely scattered business development projects. Instead, town residents share a consensus (i.e., strongly agree or agree) that the town's economic development strategies should encourage small business development (84.5%), be limited to planned areas of high density development (70.4%), and encourage small retail development (79.5%) in areas of mixed residential/commercial development (i.e., mini-villages). Conversely, respondents to the Community Survey were least likely to strongly agree/agree that future industrial and commercial development should encourage big box chain retailers (6.0%), be unrestricted (5.8%), or be evenly dispersed across the town (19.5%).

An important issue for the town's residents is how the location of future commercial and industrial development will be managed by the town, including how the physical appearance of these businesses and industries will be regulated to match the town's character. Results of the Community Survey show that respondents are most likely to agree that growth should combine residential and retail development (55.0%), rather than be limited to areas of high density (45.1% strongly agree/agree) or be unrestricted (11.5% strongly agree/agree). Thus, residents seem most amenable to small scale developments that combine residential and small commercial development clusters throughout town. This coincides with the desire of residents to maintain the town's character.

A majority of respondents to the survey also feel that the current rate of commercial development (59.9%) and industrial development (60.4%) is "just right", while small percentages of respondents agree that the rate of commercial development (16.9%) and industrial development (18.8%) is "too fast." Finally, when asked what the business development goal should be for Marion, more than half (53.7%) of respondents strongly agree or agree that the town seek to attract new businesses, while 46.0 percent strongly agree or agree that the goal should be to expand existing businesses. Only 10.6 percent strongly agree or agree that the primary goal should be to promote larger industries.

While a majority of respondents to the survey do not support large scale commercial or industrial development, this poses the attendant problem of how the town will meet the needs of a growing community with a town budget that relies primarily on residential property taxes (see Table 7 below). Yet, at the same time, respondents to the Community Survey strongly agree/agree that property taxes should be kept stable (94.1%). In fact, more than half of the survey respondents (54.6%) strongly agree or agree that property taxes should be kept stable even if it means reducing services and programs. Thus, the town will have to be creative in attracting the right mix of commercial development, while holding property taxes stable and servicing a growing population.

Table 7
Revenue Components

Fiscal Year 1981 - 2005 Revenue Components								
As Percent of Total								
MARION					STATE AVERAGE			
FY	Tax Levy	State Aid	Local Receipts	All Other	Tax Levy	State Aid	Local Receipts	All Other
1982	75.7	10.3	10.3	3.7	54.5	24.9	12.9	7.8
1983	71.3	9.9	9.2	9.6	51.0	26.9	13.7	8.4
1984	72.5	10.8	9.6	7.2	49.8	27.8	14.6	7.8
1985	73.3	11.0	9.2	6.5	48.4	28.9	15.6	7.0
1986	71.7	10.4	9.2	8.7	47.6	29.2	15.8	7.4
1987	72.9	10.9	9.9	6.3	46.2	31.1	16.1	6.6
1988	72.1	10.9	12.7	4.3	46.0	31.2	16.4	6.3
1989	72.9	7.9	12.1	7.1	46.2	30.2	17.4	6.3
1990	74.6	5.0	15.8	4.6	47.8	26.4	19.6	6.2
1991	74.2	3.4	13.1	9.3	49.7	24.4	20.0	5.9
1992	74.7	2.4	12.7	10.2	52.4	21.5	21.3	4.8
1993	74.3	2.9	13.0	9.8	52.9	22.1	20.5	4.6
1994	72.5	3.0	11.6	12.9	52.6	22.6	20.0	4.9
1995	72.0	3.0	15.3	9.8	52.1	23.3	20.1	4.5
1996	72.8	3.4	13.9	9.9	51.2	24.2	19.9	4.8
1997	72.7	3.8	14.3	9.2	51.5	25.6	17.6	5.2
1998	72.2	4.5	13.6	9.7	51.1	26.6	17.4	4.9
1999	73.0	4.5	13.0	9.5	50.2	27.3	17.5	5.0
2000	72.4	5.1	14.5	8.0	49.7	27.8	17.4	5.1
2001	68.4	5.6	19.9	6.1	49.3	27.9	17.4	5.3
2002	67.6	4.9	16.3	11.1	49.4	28.1	17.0	5.6
2003	75.6	5.0	17.7	1.7	50.8	27.1	17.1	5.0
2004	73.9	3.7	17.2	5.2	52.8	24.7	17.6	5.0
2005	70.5	3.4	19.4	6.8	53.2	24.3	17.8	4.7

Source: Massachusetts Department of Revenue Division of Local Services - Municipal Data Bank /Local Aid Section

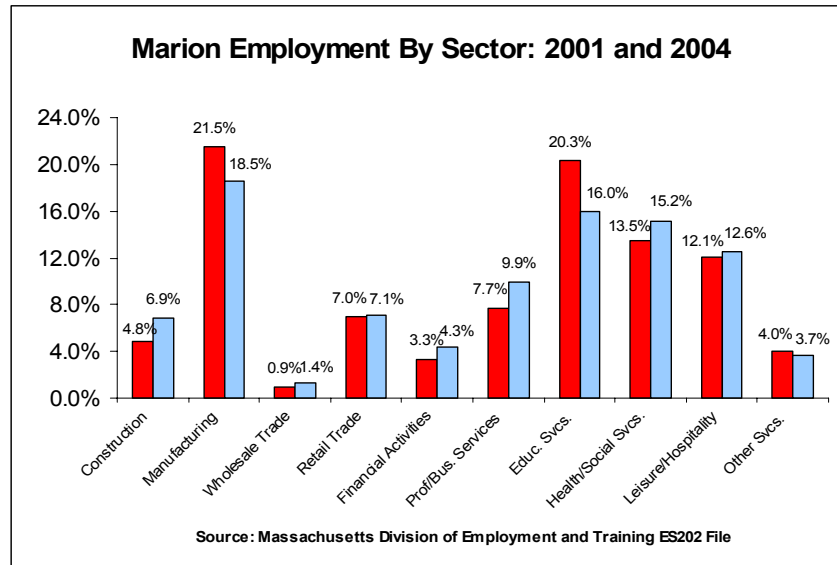
Source: Massachusetts Department of Revenue Division of Local Services - Municipal Data Bank /Local Aid Section

3.21 Supporting Data

3.21a Employment by Sector

Total employment in Marion is 1,920 (ES202, 2004).⁸ Marion's three largest employment sectors are Manufacturing (18.5%), Educational Services (16.0%), Health and Social Services (15.2%) (see Figure 7). Employment ratios declined in three sectors from 2001 to 2004: Manufacturing, Educational Services, and Other Services.

Figure 7
Employment by Sector

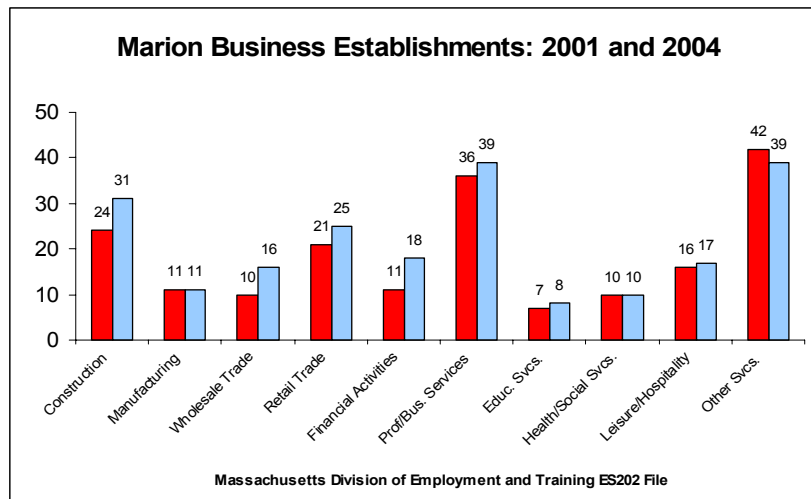


⁸ The ES202 data series measures the number and types of jobs located in Marion and not the number of Marion residents who are employed. ES202 data is based on North American Industry Classification System (NAICS) data. Comparative data in this series is only available from 2001. Previous data was available from the Standard Industrial Classification (SIC) series, which is no longer in use. Thus, employment comparisons earlier than 2001 cannot be made without considerable translation and reclassification of earlier data.

3.21b Top Industries by Business Units

There are 206 business establishments in Marion (ES-202, 2004). The three sectors with the highest number of business establishments are Professional/Business Services (39), Other Services (i.e., repair/maintenance, maids, gardeners, caretakers) (39), and Construction (31). The only sector decline in the number of units from 2001 and 2004 was in Other Services.

Figure 8
Business Establishments

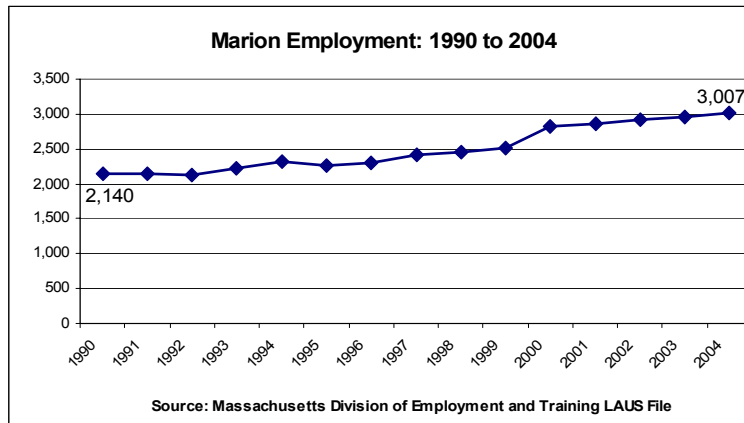


3.21c Employment

The average number of Marion residents who were employed in 2004 was 3,007 (LAUS).⁹ Employment has increased by 40.5% since 1990 (see Figure 9). Marion has a larger percentage of residents who are self-employed compared to the state. The percentage of Marion residents who are self employed is 9.5 percent, compared to 6.4 percent for the state (U.S. Census Bureau, 2000).

⁹ Labor Area Unemployment Statistics (LAUS) data measures the number of Marion residents who are employed by a business establishment regardless of where they work.

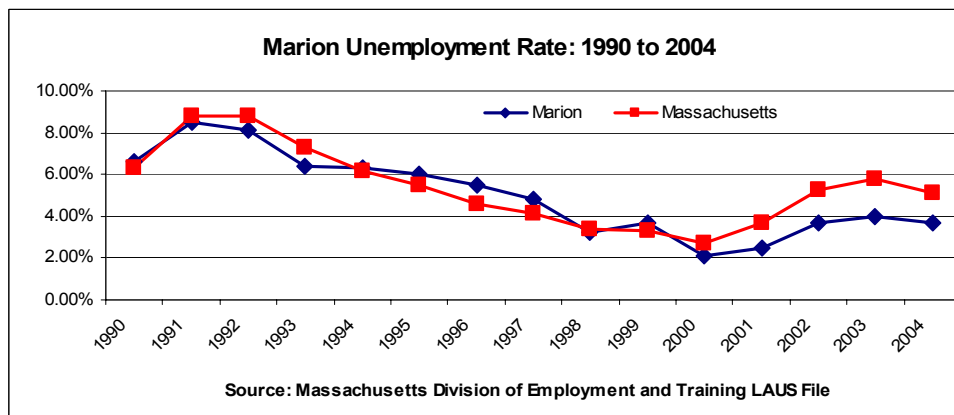
Figure 9
Total Employment



3.21d Unemployment

The average unemployment rate in Marion in 2004 was 3.7% (LAUS), which compares to a state unemployment rate of 5.1%. Since 1990, Marion's unemployment rate has generally tracked the statewide rate within 1.0% each year (see Figure 10).

Figure 10
Unemployment Rate



3.21e Wages

The annual average wages paid by businesses located in Marion are below the statewide average. In 2004, average annual wages in Marion were \$43,108, compared to an annual average wage of \$48,932 for the state (MassDET ES-202) (see Table 8).¹⁰ Wages in Marion increased by 83.1 percent from 1990 to 2004, while they increased 83.5 percent statewide over the same period.

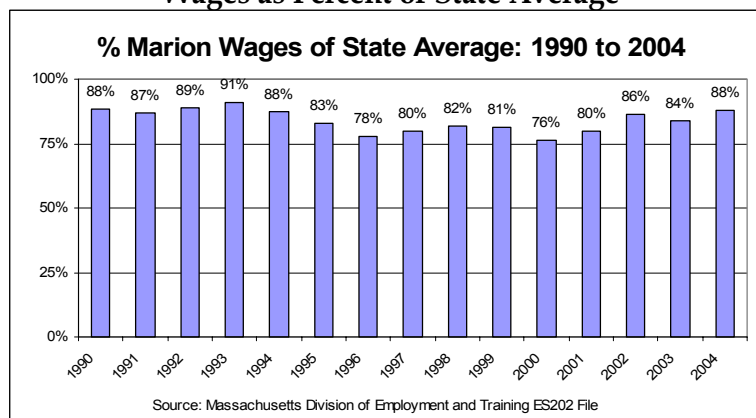
Table 8
Marion and State Wages

Wages: 1990 to 2004			
Year	Marion	State	% Diff.
1990	\$ 23,548	\$ 26,667	-13.2%
1991	\$ 24,351	\$ 28,030	-15.1%
1992	\$ 26,312	\$ 29,651	-12.7%
1993	\$ 27,534	\$ 30,229	-9.8%
1994	\$ 27,152	\$ 31,023	-14.3%
1995	\$ 26,786	\$ 32,332	-20.7%
1996	\$ 26,383	\$ 33,926	-28.6%
1997	\$ 28,527	\$ 35,716	-25.2%
1998	\$ 30,811	\$ 37,774	-22.6%
1999	\$ 32,736	\$ 40,352	-23.3%
2000	\$ 33,698	\$ 44,326	-31.5%
2001	\$ 35,869	\$ 44,976	-25.4%
2002	\$ 38,896	\$ 44,980	-15.6%
2003	\$ 38,740	\$ 46,332	-19.6%
2004	\$ 43,108	\$ 48,932	13.5%

Source: Massachusetts Division of Employment and Training ES202 File

Marion's average annual wages are 88% of the state annual (2004) (see Figure 11). The wage gap was highest in 2000 (76%) and lowest in 1993 (91%).

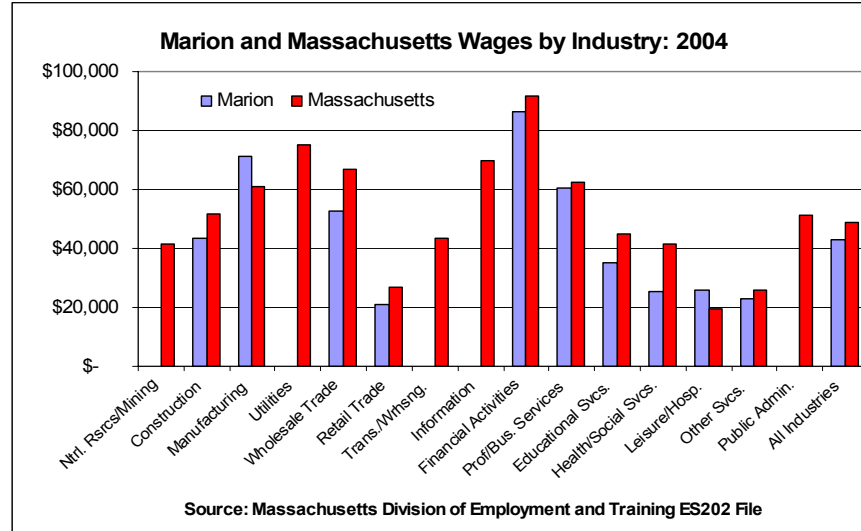
Figure 11
Wages as Percent of State Average



¹⁰ The ES202 data series measures wages paid for jobs located in Marion and not the wages earned by all Marion residents employed elsewhere.

In 2004, average annual wages in Marion exceeded state averages in only two major industries: Manufacturing and Leisure/Hospitality (see Figure 124).

Figure 12
Wages by Industry



3.30 CULTURE

The Town of Marion has a long-standing civic culture characterized by volunteerism and a participatory citizenry. Many residents have lived in Marion for all or most of their lives and feel a deep connection to the community. The Community Survey indicates that nearly half (47.1%) of respondents have lived in Marion for at least 20 years. Most of the town's boards, commissions, and committees are staffed by volunteers. The Fire Department and Emergency Medical Service rely on volunteers and "call" personnel. In fact, the town's Emergency Medical Services operation relies almost entirely on donations from citizens. Similarly, most of the cultural activities and special events in Marion are organized by citizen volunteers.

However, as documented earlier, population growth in Marion is fueled primarily by new residents, who may be less likely to participate in town governance and other volunteer activities, because they often come from towns or cities where public services are delivered by full-time professional employees, or because commuting and out-of-town work responsibilities make it difficult to find time for volunteer work. In interviews with town department heads, it was reported that some departments and organizations are already finding it difficult to attract volunteers on a regular basis or in sufficient numbers. If this trend continues, the town's changing population and economy will have an impact on its civic culture and on the way the town organizes public service delivery.

If there are insufficient call personnel or volunteers, the town may be forced to hire more part-time and full-time employees instead of relying on volunteers as in the past, which will have an impact on the organizational and management structure of town government and the town budget. For example, a major issue for the Emergency Medical Service is its ability to recruit and retain volunteers who are available and willing to respond to requests for emergency services. Without volunteers, Marion will have no choice but to put permanent staff on the payroll. The Fire Department is also finding it more difficult to recruit call volunteer firemen as more and more residents work out of town.

Another trend that will affect the town's civic culture is the demographic composition of new residents. As residential property becomes too expensive for middle class families, there is some concern that Marion will increasingly attract affluent seasonal homeowners, who are less likely to be involved with the schools, special events, and town governance and to be less willing to support tax increases to pay for enhanced services. Furthermore, many town employees, such as policemen, teachers, and other municipal workers, will find it necessary to live out of town, where the cost of housing is less expensive. There is some concern that as town employees no longer live in the town, they come to view their employment as "just a job" with no direct relationship to their own community.

3.31 Supporting Data

3.32a Commute to Work

The average commute to work time of Marion residents increased by 5.6 minutes from 1990 to 2000 (+26.0%) (see Table 7). Marion's average commute to work time increased at a faster rate than the state as a whole. Its ranking among the 351 Massachusetts cities and towns, based on commuting time, increased from the 271st longest commute in 1990 to the 198th longest commute in 2000. This may reflect an increase in the number of residents working in Boston, Providence, and other metropolitan areas either because they are originally from out of town or because high paying job opportunities are not available in the local area.

Table 9
Commuting Time

	1990	1990 State Rank (of 351)	2000	2000 State Rank (of 351)	Change in Commuting Time
Marion	21.5	243	27.1	198	26.0%
State	22.7	-	27.0	-	18.6%

Sources: Mass.commuting, MassINC and UMass Donahue Institute, 2004; US Census 2000.

3.32b Residence, 1995-2000

Nearly sixty percent (59.8%) of Marion residents lived in the same house from 1995 to 2000, although 39.5 percent lived in a different house in 1995. More than a third (34.4%) of Marion residents who lived in a different house in 1995 moved from a different county or state. This compares to 23.1 percent of state residents who report the same (see Table 10).

Table 10
Last Place of Residence

	Same House in 1995	Diff House in 1995	Diff House Same County	Diff House Diff County	Diff County Same State	Diff State
Marion	59.4%	39.5%	17.9%	21.6%	12.8%	10.0%
Massachusetts	58.5%	38.1%	22.8%	15.3%	7.8%	11.0%

Source: U.S. Census 2000.

3.40 MANAGEMENT

Marion's population is changing in terms of its size, geographic mobility, employment characteristics, and demographic background. Population growth will increase the demand for some town services and may also affect the type of services that the town is expected to provide to residents. For example, an aging population will require more passive open space, rather than active recreation opportunities, whereas families with young children will be more interested in schools, playground equipment, and active recreational spaces. The continued escalation of home prices is requiring new residents to be higher income earners, affluent second homeowners, or longer distance commuters. These changes, in turn, are beginning to impact the delivery of services such as EMS and fire protection.

The Community Survey indicates that 94.1 percent of respondents strongly agree or agree that taxes should be kept stable. In fact, more than half of respondents to the survey (54.6%) strongly agree or agree that taxes should be kept stable even if it means reducing services and programs. However, the fact that respondents do not readily support tax increases does not mean that there will no demand for new or enhanced services. Residents clearly expect certain types of services and town amenities, but they are not always aware of the costs of these demands.

It was noted earlier that there is concern among survey respondents that new Marion residents may be less civically active than the current population. This has several implications in how the town is managed such as:

- How many employees will the Town have to hire to provide the services and activities that are normally provided by volunteers?
- How will the Town pay for these new employees?
- Will an increase in municipal staff and new forms of service delivery require a reorganization of Town government?

The Marion 2015 Task Force met with all department heads and with members of most town committees, commissions, and boards. The overall findings from these meetings show that the demand for services in Marion is likely to increase significantly as the population grows and changes in the next 15 years. For example:

Elizabeth Tabor Library: Marion's projected build-out population by the year 2023 will call for a library with roughly 16,000 square feet of usable space by that time. Proposed improvements to existing service areas include a four-fold increase in the size of current reference resources, more than double the current general bookshelf capacity, and nearly seven times more space for the children's collection.

Fire Protection: The Fire Department requires more space to store its equipment and supplies and to conduct training for employees. There are questions as to where this space will be located in town and how the town will finance the

construction of such a facility. The development of new public facilities must also be balanced with the town's priority to preserve and acquire open space. In addition, these departments face significance organizational and staffing changes if volunteers are replaced by full- or part-time professional staff.

Council on Aging: The Council on Aging currently has limited space and resources for its activities. However, as Marion's population continues to age, the demand for its services will expand in town. The median age in Marion was 42.5 years in 2000 compared to 36.5 years for the state.

Affordable Housing: Where will affordable housing be constructed in light of the increase in number of single family properties being developed? There are currently 44 (2.3%) year round Marion housing units in the Massachusetts Department of Housing and Community Development Subsidized Housing Inventory (SHI).

Recreation: There is a need for new facilities, parks, equipment, and maintenance. Much of the maintenance on fields is currently conducted by volunteers. Recreational facilities are also competing with open space needs. There is again a question as to how these services will be delivered if volunteers are not available and where new facilities and fields will be located if needed in the future.

Emergency Medical Service/Police Protection: The number of calls for EMS service increased from 427 in 1999 to 498 in 2003, (+16.6%), while calls for services to the Police Department are exceeding earlier projections (now more than 12,000 annually). The demand for these services will continue to grow as Marion's population increases and as its population ages in place. The town also needs to construct an animal kennel to support its animal control service.

Emergency Management: The best time to make important decisions about the safety of Marion residents is before disaster strikes. Emergency management exists to prevent, prepare for, respond to and recover from emergencies, disasters and catastrophes through strategic partnerships, collaborative strategies and information sharing. New mandates from state and federal agencies (e.g. Homeland Security, environmental regulations) escalate the need for a strong, evolving, and coordinated emergency management plan in Marion by sharing information, knowledge, experience, and practices.

Water: There are shortages in water storage, distribution, and supplies, although solutions to these problems are included in the town's Capital Plan. These solutions include a new water filtration plant to be constructed and financed through a regional water district that includes Fairhaven and Mattapoisett. The solutions also include the construction of a larger distribution line from the existing water source in Rochester.

Sewer: The new sewage treatment plant will require the town to hire two additional full-time employees, while two employees will be moved from other areas of the Department to meet Massachusetts Department of Environmental Protection operating requirements.

Harbormaster: There has been a significant increase in the amount of boating in Marion. The increased activity has an environmental impact on the town's harbor and it increases the number of calls for service to the Harbormaster. There are also new federal government mandates for homeland security and emergency preparedness (e.g. oil spills) that must be implemented by the Harbormaster.

While demand for town services is increasing across the board, respondents to the Community Survey report being satisfied with most town services. In fact, of the eighteen services listed in the survey, a majority of respondents rate sixteen of the services as excellent or good. Respondents are most satisfied with police protection (90.8% excellent/good), the beaches (83.9% excellent/good), and fire protection (81.6% excellent/good). Respondents are least satisfied with zoning enforcement (43.2% excellent/good) and the public sewer (47.0% excellent/good), although many of those who are dissatisfied with the town's sewer service report their dissatisfaction is because the system does not extend to their residence.

In addition, to measure future support for these services, respondents were asked how strongly they agree or disagree that the town should place more emphasis on funding, improving, or expanding various municipal services in the future. The most significant result is that more than half of respondents strongly agree or agree that the town should place more emphasis on funding, improving, or expanding each of the eighteen services listed in the survey.

3.41 Supporting Data

3.41a State Revenues

Marion has typically raised 70 percent or more of its total municipal revenues from local property taxes. However, the amount of the town revenues coming from state aid has steadily decreased from 10.3 percent in 1982 to 3.4 percent in 2005. The reduction in state aid has mostly been offset by increases in local receipts (i.e., licenses and fees) and other sources of revenues such as state and federal grants. It will be a major challenge for the town to maintain a stable tax levy, while meeting increased demands for improved or new town services.

Table 11
Revenue Components

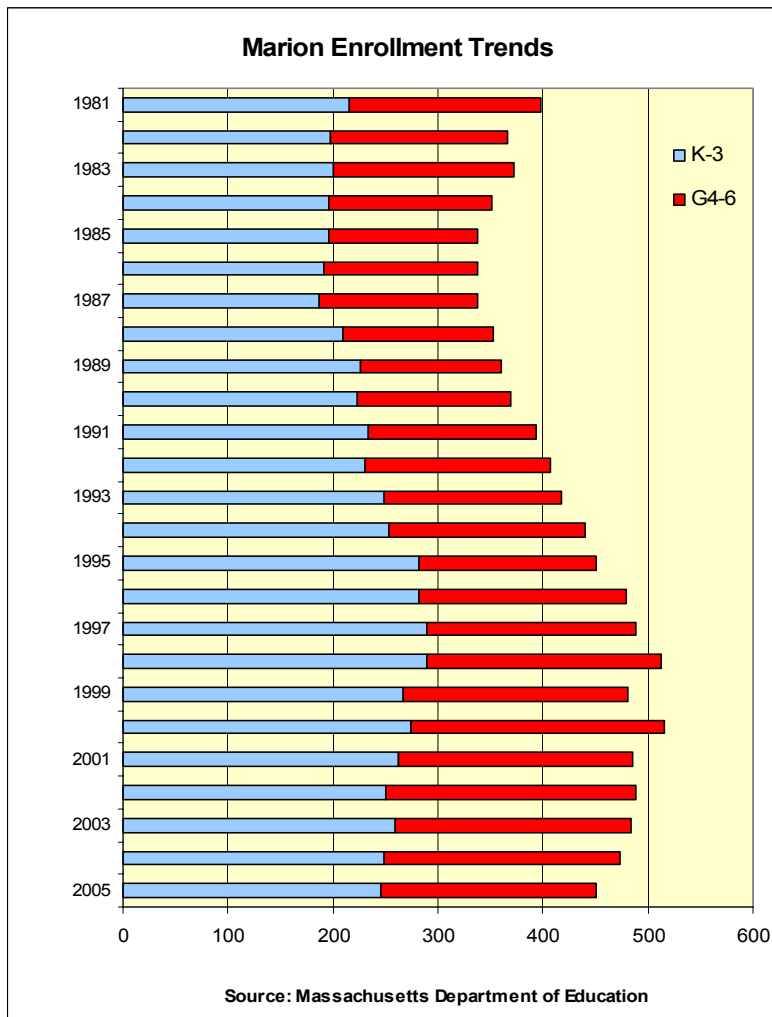
Fiscal Year 1981 - 2005 Revenue Components								
As Percent of Total								
FY	MARION				STATE AVERAGE			
	Tax Levy	State Aid	Local Receipts	All Other	Tax Levy	State Aid	Local Receipts	All Other
1982	75.7	10.3	10.3	3.7	54.5	24.9	12.9	7.8
1983	71.3	9.9	9.2	9.6	51.0	26.9	13.7	8.4
1984	72.5	10.8	9.6	7.2	49.8	27.8	14.6	7.8
1985	73.3	11.0	9.2	6.5	48.4	28.9	15.6	7.0
1986	71.7	10.4	9.2	8.7	47.6	29.2	15.8	7.4
1987	72.9	10.9	9.9	6.3	46.2	31.1	16.1	6.6
1988	72.1	10.9	12.7	4.3	46.0	31.2	16.4	6.3
1989	72.9	7.9	12.1	7.1	46.2	30.2	17.4	6.3
1990	74.6	5.0	15.8	4.6	47.8	26.4	19.6	6.2
1991	74.2	3.4	13.1	9.3	49.7	24.4	20.0	5.9
1992	74.7	2.4	12.7	10.2	52.4	21.5	21.3	4.8
1993	74.3	2.9	13.0	9.8	52.9	22.1	20.5	4.6
1994	72.5	3.0	11.6	12.9	52.6	22.6	20.0	4.9
1995	72.0	3.0	15.3	9.8	52.1	23.3	20.1	4.5
1996	72.8	3.4	13.9	9.9	51.2	24.2	19.9	4.8
1997	72.7	3.8	14.3	9.2	51.5	25.6	17.6	5.2
1998	72.2	4.5	13.6	9.7	51.1	26.6	17.4	4.9
1999	73.0	4.5	13.0	9.5	50.2	27.3	17.5	5.0
2000	72.4	5.1	14.5	8.0	49.7	27.8	17.4	5.1
2001	68.4	5.6	19.9	6.1	49.3	27.9	17.4	5.3
2002	67.6	4.9	16.3	11.1	49.4	28.1	17.0	5.6
2003	75.6	5.0	17.7	1.7	50.8	27.1	17.1	5.0
2004	73.9	3.7	17.2	5.2	52.8	24.7	17.6	5.0
2005	70.5	3.4	19.4	6.8	53.2	24.3	17.8	4.7

Source: Massachusetts Department of Revenue Division of Local Services - Municipal Data Bank /Local Aid Section

3.41b School Enrollment

A town's public schools are usually the single largest expenditure in the municipal budget. Consequently, school enrollment trends and the number of school-aged children in the town have a significant impact on the town's budget. While the rehabilitation and expansion of the Sippican School in 2001 was designed to provide capacity for future enrollment increases, school enrollment in grades K-6 reached a peak in 2000 and subsequently declined by 12.6 percent from 2000 to 2005.

Figure 13
Enrollment Trends



3.41c Per Pupil Expenditures

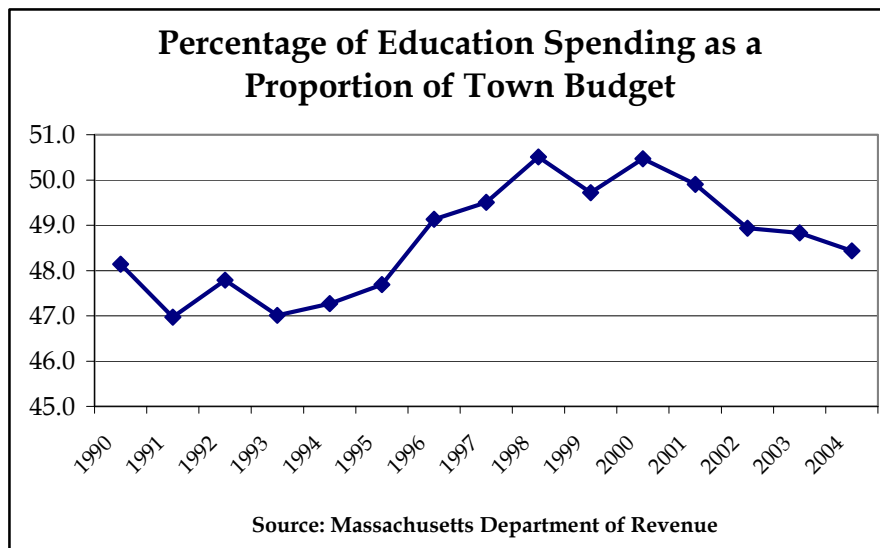
Marion's total per pupil expenditures have increased by 77.9 percent since 1995, while they increased 55.5 percent statewide. The percentage of education spending as proportion of the town budget was higher in 2004 than in 1990, although this percentage has been in decline since 2000.

Table 12
Per Pupil Expenditures

Marion Per Pupil Expenditures - Day Programs				
FY	Regular	Sped	Total	State Average
FY 95	\$ 4,546	\$ 10,076	\$ 5,204	\$ 5,524
FY 96	\$ 4,640	\$ 11,352	\$ 5,391	\$ 5,750
FY 97	\$ 4,910	\$ 13,434	\$ 5,885	\$ 6,015
FY 98	\$ 5,157	\$ 15,072	\$ 6,257	\$ 6,361
FY00	\$ 5,364	\$ 12,832	\$ 6,491	\$ 7,149
FY01	\$ 6,132	\$ 16,491	\$ 7,452	\$ 7,561
FY02	\$ 6,801	\$ 16,674	\$ 8,265	\$ 8,005
FY03	\$ 7,436	\$ 13,423	\$ 8,425	\$ 8,264
FY 04	\$ 7,521	\$ 18,313	\$ 9,259	\$ 8,591
% Incr.	65.4%	81.7%	77.9%	55.5%

Source: Massachusetts Department of Education

Figure 14
Percentage of Education Spending as Proportion of Town Budget



3.50 DIVERSITY

Diversity can be defined as recognizing, appreciating, valuing, and utilizing the unique talents and contributions of all individuals regardless of age, career experience, color, culture, disability, educational level, employee status, ethnicity, gender, language, marital status, national origin, parental status, physical appearance, race, regional origin, religion, or sexual orientation. Diversity can also include the town's business sector as well as its residents, which includes a mix of types and sizes of businesses that employ persons across a range of occupations, educational and skill levels, and ages.

3.51 Diversity of Residents

Marion's population is changing in terms of income, age, and education. While it is difficult to predict the degree of change that will occur in the next ten years, U.S. Census data from the last decade suggests that if present trends continue, the town's population will be more affluent, include more seasonal homeowners, and be older by 2015. If the town's population does change significantly, how will this change impact the town in terms of the demand for services, the types of services, and the organization and management of Marion town government? It has been noted previously that Marion prides itself on its civic participation and volunteer culture. What changes will new residents bring and how involved will they be in Marion affairs? And if new residents are not as civic minded, how will that affect Marion town government, its cultural events, sports teams, and other institutions that rely heavily on citizen volunteers?

3.52 Supporting Data

3.52a Income

Marion residents have higher per capita, median household, and median family incomes in comparison to state averages. Incomes in Marion are also increasing at a faster rate than the state since 1979 so it is becoming more affluent over time when compared to other communities.

Table 13
Per Capita Income

Per Capita Income: 1979 to 1999				
	1979	1989	1999	% Change
Marion	\$ 9,371	\$ 21,876	\$ 37,265	297.7%
State	\$ 7,458	\$ 17,224	\$ 25,952	248.0%

Source: U.S. Census Bureau

Table 14
Median Household Income

Median Household Income: 1979 to 1999				
	1979	1989	1999	% Change
Marion	\$ 19,688	\$ 46,189	\$ 61,250	211.1%
State	\$ 17,575	\$ 36,952	\$ 54,077	207.7%

Source: U.S. Census Bureau

Table 15
Median Family Income

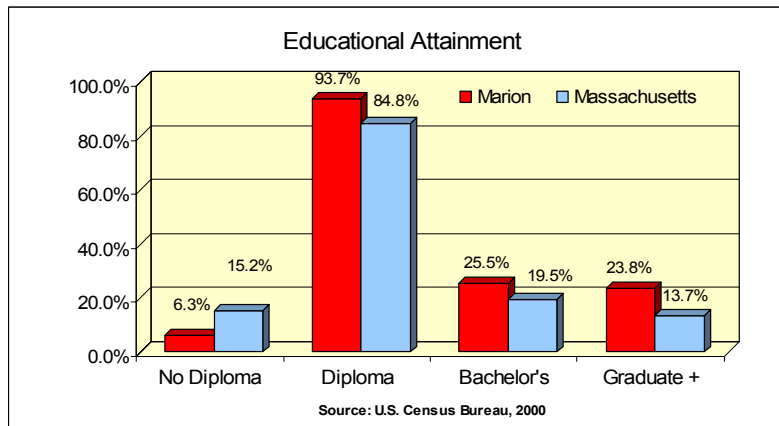
Median Family Income: 1979 to 1999				
	1979	1989	1999	% Change
Marion	\$22,485	\$52,163	\$74,265	230.3%
State	\$21,166	\$44,367	\$63,706	201.0%

Source: U.S. Census Bureau

3.52b Educational Attainment

Marion's population is more educated than the state as a whole and has become increasingly more educated since 1980. More than ninety-three percent (93.7%) of Marion residents 25 years of age and older have a high school diploma, compared to 84.8 percent statewide. A higher percentage of Marion residents possess a Bachelor's degree or a graduate degree in comparison to the state's population.

Figure 15
Educational Attainment



3.52c Ethnicity and Ancestry

Marion's population is less diverse than the state as a whole in terms of its racial and ethnic composition. For example, ninety-two percent of residents in Marion (91.6%) are white Caucasian, compared to 77.8 percent statewide (U.S. Census 2000). In addition, Marion's major ancestry groups primarily immigrated to this country in the early 1900s or before. This is reflected in the percentage of Marion residents who primarily speak a language other than English (2.5%) compared to the state (16.4%).

Table 16
Race/Ethnicity

Race/Ethnicity: 2000		
	Marion	State
White	91.6%	77.8%
African American	1.6%	5.4%
Amer. Indian	0.1%	0.2%
Asian	0.4%	3.8%
Hawaiian/Pacific	0.1%	0.0%
Other	3.5%	3.7%
Two or More Race:	2.3%	2.3%
Hispanic	0.5%	6.8%
<i>Source: U.S. Census Bureau</i>		

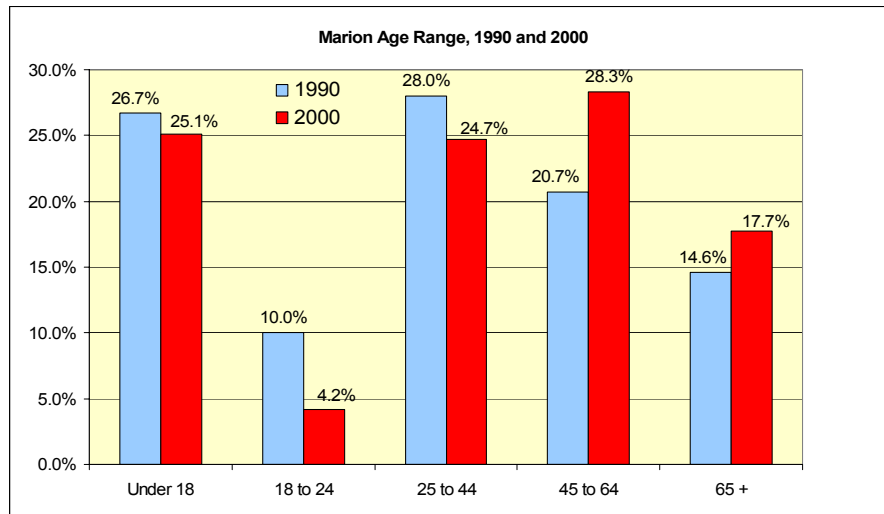
Table 17
Major Ancestries

Major Ancestries		
	<u>Marion</u>	<u>State</u>
Irish	27.6%	22.5%
English	21.9%	11.4%
Portuguese	8.3%	4.4%
German	7.2%	5.9%
Note: The population threshold for ancestry reporting is 100. Therefore, most ancestries for Marion are not reported by the U.S. Census Bureau.		
<i>Source: U.S. Census Bureau STF4 (2000)</i>		

3.52d Age

Marion's population has grown older since 1990. For example, the percentage of Marion residents in the 0 to 18, 18 to 24, and 25 to 44 year age groups has declined, while the percentage of residents in the 45 to 64 and 65 and older age groups has increased. In 2000, the median age in Marion was 42.5 years compared to 36.5 years for the state (U.S. Census Bureau, 2000).

Figure 16
Age of Marion Residents

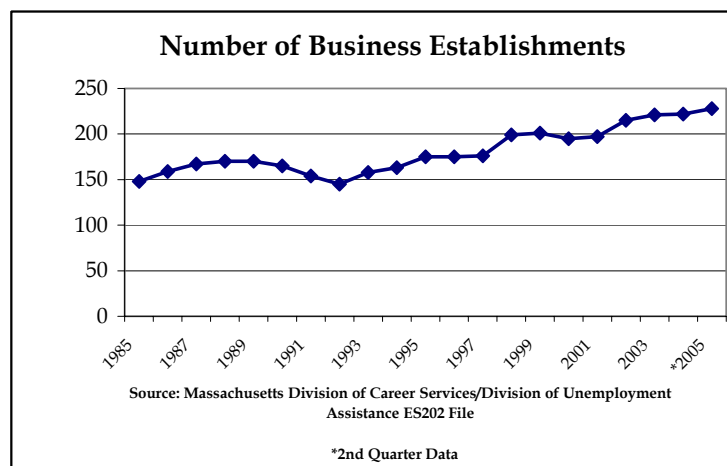


3.53 Business Diversity

There is evidence to suggest that a diverse economy is a more stable economy. Economic diversification means that a town's economic base is not dependent on a single employer or industry, but has different types and sizes of businesses that provide employment opportunities for persons in different occupations, educational and skill levels, and wage levels. However, the preservation of Marion's town character depends more on the type, size, and quality of businesses than the mere number of business establishments.

The number of business establishments in Marion increased by 63 from 1990 to 2005 (38.2%). This compares to an increase of 33.4 percent statewide. While business growth is important in that new businesses provide jobs and contribute to the town's tax base, the types and quality of businesses established in Marion are equally important in that they contribute to Marion's character and to the quality of life of its residents.

Figure 17
Number of Business Establishments



The high cost of housing may also impact Marion's business diversity, especially in the village area, due to pressures to sell these properties and convert them to homes. Thus, the housing market is impacting the vitality of the town village and potentially eroding a business cluster that has been a key element of the town's character, as well as its economic base.

In addition, there are approximately 109 marine-related jobs located in Marion and a fourth of those employed in this industry are Marion residents. Most of these jobs are located on the town's waterfront and add to the seaside historic character of the town. A working waterfront that is connected to a vibrant central village area are two of the most important factors that contribute to Marion's character and steps will need to be taken to preserve both.

As noted earlier, the Community Survey indicates that Marion have clear business development goals. Marion residents do not support a significant increase in commercial or industrial development. For example, the Community Survey indicates that a large majority of respondents feel that there is “enough” industrial (73.2%) and commercial (72.6%) land use in the town. Instead, residents share a consensus (i.e., strongly agree or agree) that the town’s economic development strategies should encourage small business development (84.5%), be limited to planned areas of high density development (70.4%), and encourage small retail development (79.5%) in areas of mixed residential/commercial development (i.e., mini-villages). This coincides with the desire of residents to maintain the town’s character. Conversely, respondents to the Community Survey were least likely to strongly agree/agree that future industrial and commercial development should encourage big box chain retailers (6.0%), be unrestricted (5.8%), or be evenly dispersed across the town (19.5%).

In addition, a majority of respondents to the survey also feel that the current rate of commercial development (59.9%) and industrial development (60.4%) is “just right”, while small percentages of respondents agree that the rate of commercial development (16.9%) and industrial development (18.8%) is “too fast.” Finally, when asked what the business development goal should be for Marion, more than half (53.7%) of respondents strongly agree or agree that the town seek to attract new businesses, while 46.0 percent strongly agree or agree that the goal should be to expand existing businesses. Only 10.6 percent strongly agree or agree that the primary goal should be to promote larger industries.

3.60 AFFORDABILITY

A community development issue facing Marion is affordability. Residential property in Marion is becoming increasingly expensive for middle class and working class families. Much of the available housing is unaffordable to many families and young couples who would like to move to town as well as those who are current Marion residents. There is concern that Marion will become unaffordable to town employees, the children of life-long residents, and retirees seeking to return home. As housing becomes more expensive, many residents must seek better paying employment further from town (e.g., Boston and Providence), or work longer hours, and this has the potential to affect the town's character and civic culture.

The average selling price of a single family home in Marion increased by 177 percent from 1993 to 2005, while single family tax bills in Marion increased by 205 percent from 1988 to 2005. In some respects, the housing affordability problem is a result of the market that Marion has created by controlling growth, while maintaining good schools, parks, recreational programs, and other town amenities. A central community development issue, therefore, is how to keep Marion affordable for current residents and families, while providing housing opportunities for new residents who would like to live and work in Marion. Equally important, the high cost of housing may have a significant effect on the town's demographics, although town residents indicate that maintaining the town's diversity in terms of age, income, and other characteristics is a highly valued goal.

The Community Survey found that 43.4 percent of respondents view the high cost of housing as a critical issue in Marion and housing affordability was the second highest concern among residents among the issues listed in the survey. More than half of the survey respondents (54.9%) also indicate that there is "too little" affordable housing in Marion.

In identifying solutions to this problem, respondents are most likely to support the development of an independent living facility for the elderly (77.4% strongly agree/agree). A majority of respondents also strongly agree or agree that future residential development policies should encourage the development of an assisted living facility (68.8%), require developers to construct more affordable housing (58.8%), and authorize the construction of condominiums or townhouses in selected areas (56.6%) of the town. Thus, residents are looking beyond large scale single family developments and would like to see a mix of solutions that includes mixed use high density development. At the same time, a high percentage of respondents also want to restrain future residential development (74.2% strongly agree/agree), which may only exacerbate the existing housing affordability problem (Greenberger 2006).

Residential cluster zoning has been suggested as a possible solution to Marion's housing affordability issue. However, there has been some reluctance to pursue this type of development because cluster zoning is often seen as squeezing more people onto smaller pieces of land, which in effect may increase the town's population significantly. However, cluster zoning generally requires the same amount of acreage per residence,

i.e., land that would normally be developed in a large lot development is reserved for open space, while the actual housing development is clustered on smaller lots. Thus, the population impact of a cluster development may not be significantly different than for large lot development, although more land can be set aside for open space, recreation, and other public uses.

3.61 The Marion Housing Plan

The Marion Housing Plan is taking steps to address the housing problem. The Marion Plan is designed to meet the needs of Marion people of all ages and financial situations while at the same time satisfying the requirements of Massachusetts legislation known as Chapter 40B, which mandates that at least 10 percent of a town's housing stock be affordable. Chapter 40B was designed to encourage the construction of affordable homes by reducing local barriers to dense housing developments such as zoning restrictions requiring one-acre lots. A municipality's affordable housing stock includes all publicly-owned housing developments, but it may also include private housing developments constructed with direct public subsidies or that receive favorable financing from public agencies. Private developers who receive construction or loan subsidies from a government agency must agree to set aside 25 percent of the units as affordable (price and income) and maintain the units as affordable housing for 20 years.

Chapter 40 also establishes an administrative process that allows zoning boards of appeals (ZBA) to approve dense developments that have been rejected by the town or city, if 25 percent of the units meet the long-term affordability mandate. If the ZBA rejects such a project, and less than 10 percent of that community's housing is affordable, the developer can next petition the Massachusetts Housing Appeals Committee (MHAC). The Appeals Committee can overrule a local decision and that of the ZBA unless the development poses serious health or safety concerns. The Appeals Committee can issue a special permit that allows the developer to build more densely in a town than would be allowed by local ordinances – up to 16 units on an acre -- as long as the developer makes 25 percent of the units affordable.¹¹ If a community turns down a 40B project and the state's Housing Appeals Committee reverses the local decision, a community can lose the right to impose any conditions or restrictions on the development.

When faced with such developments, many of the Chapter 40B's critics argue that the appeals process tips the scale toward developers, who can use the law against small cities and towns, who after rejecting smaller conventional proposals are threatened with large Chapter 40 development. The law's critics point to the impact of dense developments on schools, water, sewage treatment, solid waste disposal, snow plowing, street maintenance, fire and police protection, and other municipal services. In effect, a town that does not meet the 10 percent affordable housing threshold has little control over large scale development in their town.

¹¹ For example, Cook (2006) on the approval of a 192 unit development in Marion.

The Marion housing strategy, which is continually evolving, is partial toward the development of affordable housing. This approach is taken in order to focus on the State goal of achieving and maintaining 10% of the Town's year-round housing as affordable to householders earning 80 percent of Marion's median income. Once this 10% goal is achieved, a broader, more balanced approach to planning for Marion housing will be adopted. Until the 10 percent threshold is reached, the town will have little control over the type of large scale housing development proposed by developers. By following the Marion Affordable Housing Plan and seeing that 16 affordable units are added to the SHI annually until the 10 percent DHCD goal is achieved, the Town can deny any 40B developers proposal that does not meet the Town's needs as defined in the Plan. If Marion's leadership consistently focuses on this principle, the Town's housing needs can be consistently met.

Marion has several unsatisfied housing needs which fall into four broad categories: (1) Elderly people, (a) of modest means and (b) those interested in downsizing from larger homes; (2) Young people who grew up in Marion and are now returning as renters or first-time homebuyers; (3) People who work for the Town and would like to live in the community but cannot afford to do so and, (4) People with close family ties to current Marion homeowners, such as parents who would like to be close to their children.

A survey conducted by the Center for Policy Analysis in 2001 and subsequent discussions with some of these homeowners found that there are a number of low-income or fixed-income homeowners in Marion who, with the continued increases in the cost of living and in property taxes, are finding it increasingly difficult to afford to live in town (Barrow 2002). Many of these homeowners have lived in Marion for generations and now, because of rising housing and other costs, are at risk of having to give up their homes and move to less expensive communities in areas at a distance from family and life-long friends.

To ease this burden, the Marion Board of Selectmen and the Housing Committee developed the Marion Homes Local Initiative Program. Under this program, the Town of Marion, in conjunction with Massachusetts Division of Housing and Community Development (DHCD), planned to contract with income-eligible Marion homeowners to add permanent restrictions and marketing covenants to the deeds on their homes so that when those homes are sold: (A) they are sold at a price that meets the affordable guidelines for homes in the area; (B) they are sold using DHCD-approved marketing guidelines and, (C) they are sold only to income-eligible homeowners. In exchange for these considerations, the homeowner would be exempt from Town property taxes.

The Center for Policy Analysis survey and U.S. Census Bureau data found that Marion had 2,095 year round housing units and that 523 of the single-family homes were assessed at \$135,000 or less. The Marion Homes Program was based largely on this data. By the fall of 2005, HUD's family income data had increased Marion's affordable price for a single-family house from \$135,000 to \$149,000. During that same period, however, Marion land and housing prices had increased to the point where there were no longer any single-family homes valued at or below the \$149,000 limit. Since Marion

no longer had any single-family units that met the \$149,000 threshold, the Program was abandoned.

However, by establishing the Marion Housing Trust and charging this new municipal organization with responsibility for seeing that both “affordable” housing and, somewhat more costly, “low cost” housing is built under the DHCD Local Initiative Program, Marion has at least created an institutional mechanism for addressing the broader population’s need for low cost housing.

3.62 Supporting Data

3.62a Housing Prices

The average selling price of a single family home in Marion increased by 177 percent from 1993 to 2005, while prices increased 114 percent statewide over this period.¹²

Table 18
Average Single Family Home Prices

Average Single Family Home Prices			
Year	*Marion		**State
	Price	# Sales	Price
1993	\$ 150,000	67	\$ 172,686
1994	\$ 160,000	69	\$ 177,700
1995	\$ 149,950	104	\$ 182,397
1996	\$ 150,042	99	\$ 192,804
1997	\$ 145,000	89	\$ 200,147
1998	\$ 200,000	91	\$ 217,103
1999	\$ 219,500	96	\$ 242,777
2000	\$ 244,000	92	\$ 287,856
2001	\$ 250,000	73	\$ 308,895
2002	\$ 289,500	76	\$ 346,019
2003	\$ 297,500	68	\$ 376,360
2004	\$ 535,000	80	\$ 340,000
*2005	\$ 415,663	62	\$ 370,000

*Note: January through November
Source: The Warren Group and Mass. Association of Realtors

12 Average home prices on the local level can fluctuate greatly from year to year due to the sale of a few expensive homes.

3.62b Single Family Tax Bills

Single family tax bills in Marion increased by 205 percent from 1988 to 2005, while they increased by 136 percent statewide over this period. However, Marion's single family tax rate is at its lowest level since 1989 which is a function of rising assessed values.

In 2005, Marion's average tax bill for a single-family home ranked 66th highest among the state's 351 towns and cities compared to 87th highest in 1989.

Table 19
Average Tax Bill

Marion Average Single Family Tax Bill						
FY 1998 to FY 2005						
FY	Average Value	Tax Rate	Single Family Tax Bill	Hi-Lo Rank	# of Towns Included	State Median
1988	217,133	6.64	1,442	109	293	1,301
1989	216,549	7.44	1,611	87	297	1,326
1990	217,885	8.54	1,861	82	323	1,504
1992	264,310	9.10	2,405	51	339	1,663
1993	221,880	10.40	2,308	74	339	1,747
1994	211,972	11.37	2,410	74	340	1,808
1995	212,836	11.70	2,490	76	340	1,872
1996	212,932	12.01	2,557	80	340	1,959
1997	228,846	11.94	2,732	74	340	2,031
1998	226,619	12.39	2,808	81	340	2,121
1999	228,011	13.50	3,078	69	340	2,191
2000	256,603	12.52	3,213	71	340	2,297
2001	258,205	12.70	3,279	83	340	2,418
2002	284,702	13.26	3,775	60	340	2,577
2003	412,054	10.07	4,149	54	340	2,709
2004	454,499	9.56	4,345	54	297	2,971
2005	552,539	7.97	4,404	66	339	3,067

*Massachusetts Department of Revenue Division of Local Services
Municipal Data Bank /Local Aid Section
Note: No Data for 1991*

3.70 TOWN CHARACTER

Preserving Marion's historic seaside village character is the central issue to Marion residents. Residents feel a strong connection to the town in terms of its size, beauty, quaintness, location, volunteerism, history, and friendliness of its residents. The town character issue is prevalent in the results of the Community Survey and Business Survey. For example:

- Nearly sixty percent (58.7%) of respondents were attracted to Marion because of the character of the Town, which is the second highest choice among respondents.
- More than thirty percent of respondents (31.7%) to the Business Survey indicate that it is very important for Marion to keep its small town character for their business to succeed.
- Forty-five percent (45.1%) of respondents identify the loss of land to development as a critical issue, the highest percentage among the twenty issues listed. Thirty-seven percent (37.1%) of respondents list the protection of historic areas as a critical issue.
- Sixty-one percent (61.2%) of respondents strongly agree or agree that the keeping the town "the same" should be the goal of Marion.
- Respondents feel that the second most important resource in Marion is its character, followed by people and community, and open space/undeveloped areas. Other resources listed as important that relate to character are small town quality, natural and historic beauty, the village/town center, and historic character.

Marion will be challenged to balance economic development, housing development, open space, and a growing population with its identity. Similarly, the town must decide how it will balance its environmental resources with an increased demand for water/waterfront uses, such as mooring permits, waterfront development, kayaking, shellfishing, fishing, and public access. Many residents already feel that Marion is changing, with sixty percent of respondents to the Community Survey describe Marion as a "town in transition".

In 2005, the total amount of protected land owned by the Town and the Commonwealth of Massachusetts in Marion totals approximately 1,406 acres. In addition, there are currently 2,675 acres of land in Marion that are classified as temporarily protected under the M.G.L. Chapters 61, 61A, and 61B tax abatement program (Beals and Thomas 2005). While the town has first right of refusal to purchase these lands if the property owner intends to take the land out of restricted status, these lands may be developed for other uses if the town does not acquire the property. Thus, these Chapter lands may have a significant positive or negative impact on the town's character depending on how they are ultimately protected or developed.

Affordable housing is also part of the town's character. As noted earlier, Marion is trying to meet the ten percent threshold under the 40B housing law. Until Marion meets the 40B threshold, the town must continue to make incremental yearly progress toward the 10 percent statutory requirement in order to maintain control of residential development. At present, Marion is implementing (1) a DHCD-approved, Affordable Housing Plan and (2) an organization (the Marion Housing Trust) as important tools that can facilitate the development of affordable and other low cost housing in Marion.

Another issue is the cost of housing in terms of cost of services (e.g. schools, water, sewers) of various types of housing versus the tax revenues that can be generated from that housing can affect town's character. The central challenge, therefore, is for the town to find ways to direct how and where residential development will occur while addressing housing affordability. In other words, what can the town do to facilitate the type of residential growth that it wants, rather than what the market dictates?

3.71 Supporting Data

3.71a Parcel Counts

The overall number of parcels in Marion increased from 2,684 in 1986 to 2,963 in 2005, an increase of 10.4 percent. However, the number of single family parcels increased by 33.4 percent, while the number of vacant land parcels decreased by 30.1 percent over this period.

Table 20
Parcel Counts by Property Class

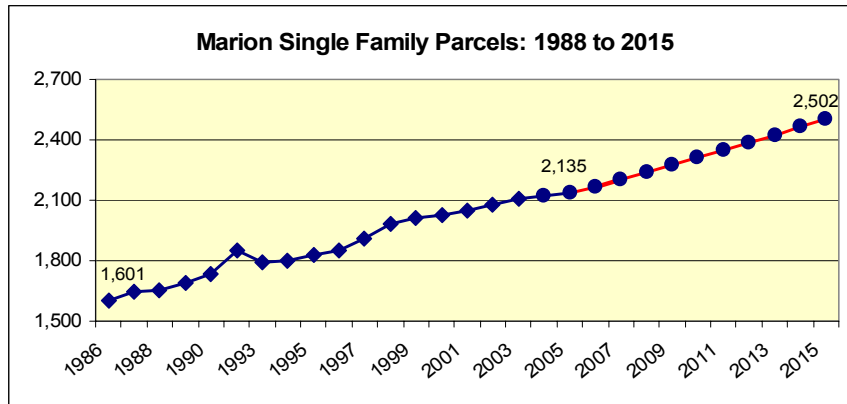
Marion Parcel Counts by Property Class: FY 86 - FY 05											
FY	Single Family	Multi Family	Condos	Apt	Misc. Residential	Vacant Land	Open Space	Commercial	Industrial	Other Usage	Total
1986	1,601	19	0	6	0	670	108	87	28	165	2,684
1987	1,647	21	0	6	0	711	111	84	24	158	2,762
1988	1,653	100	1	6	0	809	0	118	34	72	2,793
1989	1,691	103	1	6	0	819	0	113	39	74	2,846
1990	1,732	101	2	7	0	821	0	124	39	76	2,902
1991	no data	no data	no data	no data	no data	no data	no data	no data	no data	no data	no data
1992	1,850	25	2	6	0	793	0	127	36	77	2,916
1993	1,716	25	2	6	74	777	0	125	36	88	2,849
1994	1,803	26	2	6	75	758	0	125	36	87	2,918
1995	1,832	27	2	7	73	729	0	125	35	85	2,915
1996	1,853	27	2	7	78	729	0	127	35	86	2,944
1997	1,907	31	2	7	76	741	0	127	35	86	3,012
1998	1,980	31	2	8	75	646	0	127	35	87	2,991
1999	2,009	32	2	8	76	640	0	124	34	92	3,017
2000	2,029	32	2	9	76	631	0	120	35	95	3,029
2001	2,051	32	2	8	76	619	0	118	35	95	3,036
2002	2,077	33	2	8	77	585	0	118	35	95	3,030
2003	2,105	32	2	7	81	474	0	111	26	85	2,923
2004	2,119	32	6	6	85	460	0	116	26	84	2,934
2005	2,135	31	6	6	91	468	0	115	27	84	2,963
% Change	33.4%	63.2%	500.0%	0%	23.0%	-30.1%	NA	32.2%	-3.6%	-49.1%	10.4%
# Change	534	12	6	0	91	-202	NA	28	-1	-81	279

Source: Massachusetts Department of Revenue Division of Local Services - Municipal Data Bank /Local Aid Section

3.71b Single Family Parcels

The number of single-family parcels in Marion increased from 1,601 in 1986 to 2,135 in 2005, an increase of 33.4 percent (see Figure 18). The average annual rate of increase in the number of single family parcels from 1986 to 2005 was 1.6%. This value was used to calculate an estimate of growth from 2005 to 2015 assuming that the historical rate of growth remains at the same level. Under that scenario the number of single family parcels would increase from 2,135 in 2005 to 2,502 in 2015 (+17.2%).

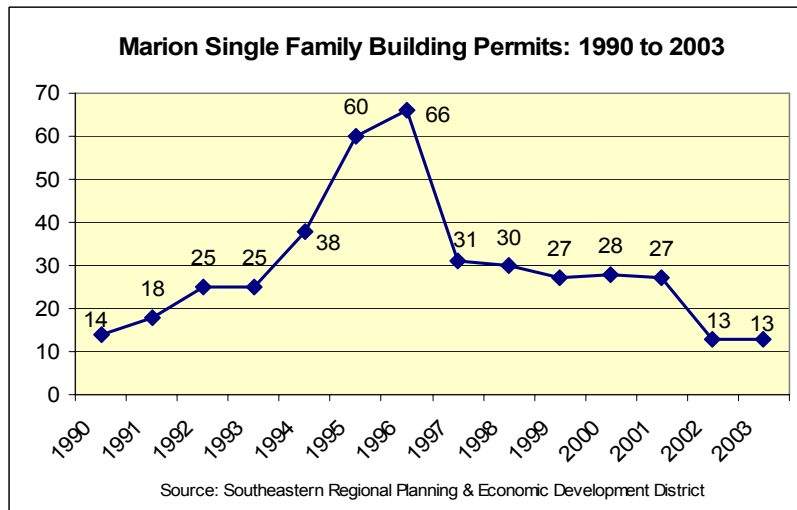
Figure 18
Single Family Parcels



3.71c Building Permits

The annual number of single family building permits issued in Marion was at its highest level in 1996 and at its lowest level in 2003.

Figure 19
Single Family Building Permits



3.71d Housing Density

Marion's housing and population density is currently about half the state average.

Table 21
Housing, Land & Water Area Per Square Mile

Marion and Peer Community Total Housing Units, Land & Water Area Per Square Mile: 2000						
	Area in Square Miles				Pop Per Square Mile	Housing Per Square Mile
	Total Housing Units	Water Area	Land Area	Total Area		
MARION	2,439	12.06	14.63	26.69	350.2	166.7
STATE					809.8	334.4
Source: Massachusetts Department of Revenue Division of Local Services Municipal Data Bank /Local Aid Section						

3.80 STABLE TAXES

Taxes are never popular. Results of the Community Survey show that 94.1 percent of respondents strongly agree or agree that the goal of Marion should be to keep taxes stable (94.1%). In fact, more than half of respondents (54.6%) strongly agree or agree that taxes should be kept stable even if it means reducing services and programs. Marion will be unable to maintain current services in light of population growth. In fact, it is likely that a growing and changing population will require new services. On top of that, the cost of running government is growing in terms of inflation, rising school budgets, health care costs, and shrinking Chapter 70 dollars. In a static environment Marion would be hard pressed to maintain services without raising property taxes, yet now the town is also faced with the task of meeting the needs of an expanding population.

How can Marion keep property taxes stable, or at a minimum, enact tax increases that are sustainable to Marion's population? Important to the solution is to attract development that will maintain or improve the town's tax base. However, the Community Survey shows that while residents are somewhat amenable to small commercial and industrial development, they are against larger projects that will have the most significant impact on the town's fiscal structure.

Residential property development will also have an effect on the town's future fiscal stability. Sprawling developments with large lot sizes may cost the town more in services than they gain in taxes. One challenge for the town is to attract the types of development that improve the fiscal stability of the town such as high density housing. This type of development may also assist in making housing more affordable. However, until Marion meets the 10 percent 40B threshold, it is difficult to get firm control on the type of housing being constructed.

It has also been difficult to keep taxes in check due to rising assessed values of Marion property. Marion residents are increasingly bearing the burden of the tax load; the ratio of Marion's residential and open space assessed property values has increased in relation to the Town's commercial and industrial property (see Table 22). How will the Town maintain its tax levy to meet increased demands from residents due to population growth and demand for new/expanded services?

Furthermore, Marion has historically levied more than 70 percent of its revenues from local property taxes, while state aid has decreased by more than half over this period. State aid accounted for only 3.4 percent of Marion's revenues in 2005. Furthermore, Marion has historically taxed itself to the limits of the local property tax levy allowed under the state's Proposition 2 ½ law.

The town has little excess capacity to pay for new facilities, services, or new employees in the future without resorting to Proposition 2 ½ overrides. In fact, Marion residents have been far more willing to approve Proposition 2 ½ overrides than the citizens of most towns and cities in Massachusetts. Since 1993, Marion has conducted 68 override votes and 44 (64.7%) of the proposed overrides have been approved by voters.

The approved overrides were primarily for general operating expenses and school expenditures.

3.81 Supporting Data

Table 22
Assessed Values by Class

Assessed Values by Class: 1981 - 2005				
FY	Marion		Massachusetts	
	Residential	Commercial	Residential	Commercial
	Open Space	Industrial	Open Space	Industrial
	Personal Prop.		Personal Prop.	
1981	81.5	18.5	77.4	22.6
1982	81.9	18.1	77.8	22.2
1983	87.4	12.6	73.8	26.2
1984	87.8	12.2	74.2	25.8
1985	87.4	12.6	71.2	26.0
1986	88.2	11.8	73.3	26.7
1987	88.5	11.5	74.8	25.2
1988	87.9	12.1	75.4	24.6
1989	88.4	11.6	75.8	23.1
1990	88.5	11.5	77.4	22.6
1991	88.6	11.4	77.2	22.8
1992	88.0	12.0	77.8	22.2
1993	88.0	12.0	78.1	21.9
1994	88.7	11.3	78.6	21.4
1995	88.8	11.2	78.8	21.2
1996	88.8	11.2	79.1	20.9
1997	90.4	9.6	79.3	20.7
1998	90.3	9.7	79.2	20.8
1999	90.3	9.7	78.9	21.1
2000	90.1	9.9	78.7	21.3
2001	90.3	9.7	79.2	20.8
2002	90.9	9.1	80.0	20.0
2003	92.5	7.5	81.2	18.8
2004	92.5	7.5	82.8	17.2
2005	93.6	6.4	84.1	15.9

Source: Department of Revenue: Division of Local Services - Municipal Databank/Local Aid Section

Table 23
Revenue Components

Fiscal Year 1981 - 2005 Revenue Components								
As Percent of Total								
FY	MARION				Tax Levy	STATE AVERAGE		
	Tax Levy	State Aid	Local Receipts	All Other		State Aid	Local Receipts	All Other
1982	75.7	10.3	10.3	3.7	54.5	24.9	12.9	7.8
1983	71.3	9.9	9.2	9.6	51.0	26.9	13.7	8.4
1984	72.5	10.8	9.6	7.2	49.8	27.8	14.6	7.8
1985	73.3	11.0	9.2	6.5	48.4	28.9	15.6	7.0
1986	71.7	10.4	9.2	8.7	47.6	29.2	15.8	7.4
1987	72.9	10.9	9.9	6.3	46.2	31.1	16.1	6.6
1988	72.1	10.9	12.7	4.3	46.0	31.2	16.4	6.3
1989	72.9	7.9	12.1	7.1	46.2	30.2	17.4	6.3
1990	74.6	5.0	15.8	4.6	47.8	26.4	19.6	6.2
1991	74.2	3.4	13.1	9.3	49.7	24.4	20.0	5.9
1992	74.7	2.4	12.7	10.2	52.4	21.5	21.3	4.8
1993	74.3	2.9	13.0	9.8	52.9	22.1	20.5	4.6
1994	72.5	3.0	11.6	12.9	52.6	22.6	20.0	4.9
1995	72.0	3.0	15.3	9.8	52.1	23.3	20.1	4.5
1996	72.8	3.4	13.9	9.9	51.2	24.2	19.9	4.8
1997	72.7	3.8	14.3	9.2	51.5	25.6	17.6	5.2
1998	72.2	4.5	13.6	9.7	51.1	26.6	17.4	4.9
1999	73.0	4.5	13.0	9.5	50.2	27.3	17.5	5.0
2000	72.4	5.1	14.5	8.0	49.7	27.8	17.4	5.1
2001	68.4	5.6	19.9	6.1	49.3	27.9	17.4	5.3
2002	67.6	4.9	16.3	11.1	49.4	28.1	17.0	5.6
2003	75.6	5.0	17.7	1.7	50.8	27.1	17.1	5.0
2004	73.9	3.7	17.2	5.2	52.8	24.7	17.6	5.0
2005	70.5	3.4	19.4	6.8	53.2	24.3	17.8	4.7

Source: Massachusetts Department of Revenue Division of Local Services - Municipal Data Bank /Local Aid Section

Table 24
Excess Capacity

Marion Excess Capacity: 1985 to 2005					
FY	Levy Limit without Debt & Capital Exclusions	Maximum Levy Limit	Total Tax Levy	Excess Capacity	Excess as a % of Maximum Levy
1985	2,970,291	2,970,291	2,967,334	2,957	0.10%
1986	3,139,063	3,139,063	3,135,993	3,070	0.10%
1987	3,338,468	3,338,468	3,332,975	5,493	0.16%
1988	3,553,147	3,553,147	3,552,214	933	0.03%
1989	4,012,661	4,012,661	4,009,904	2,757	0.07%
1990	4,601,212	4,684,673	4,684,637	36	0.00%
1991	5,055,317	5,337,804	5,307,203	30,601	0.57%
1992	5,449,960	5,802,183	5,793,012	9,171	0.16%
1993	5,637,426	5,977,961	5,974,974	2,987	0.05%
1994	5,820,748	6,223,335	6,223,034	301	0.00%
1995	6,047,025	6,437,803	6,436,624	1,179	0.02%
1996	6,395,312	6,662,860	6,661,379	1,481	0.02%
1997	6,860,685	7,214,143	7,209,204	4,939	0.07%
1998	7,352,843	7,523,452	7,523,451	1	0.00%
1999	7,926,044	8,362,912	8,329,919	32,993	0.39%
2000	8,432,983	8,722,254	8,717,752	4,502	0.05%
2001	8,859,660	9,550,150	8,930,352	619,798	6.49%
2002	9,252,160	10,571,272	10,303,143	268,129	2.54%
2003	9,758,795	11,089,076	11,062,929	26,147	0.24%
2004	10,388,241	11,693,455	11,681,736	11,719	0.10%
2005	10,974,010	11,943,184	11,925,213	17,971	0.15%

Source: Massachusetts Department of Revenue Local Services Division

4.00 MARION 2015: OBJECTIVES AND ACTIONS

The objectives defined the Marion 2015 Task Force build upon and only slightly modify the objectives established by the Marion Growth Management Committee in January of 1995. The Task Force found that the underlying town vision identified by the Growth Management Committee at that time has not changed substantially in the intervening 10 years. This conclusion is confirmed by the results of the community and business surveys commissioned by the Task Force and by the many interviews conducted with town officials and citizens over a two year period (see Section 2.00). The Task Force also finds that most of the concerns reported by citizens, business owners, and town officials are justified based on its analysis of supporting data.

The Task Force found that most of the recommendations proposed by the Growth Management Committee in 1996 have been implemented over the previous ten years. These actions have been mostly successful in preserving Marion's town character, but the success of these actions continues to make Marion an attractive residential community, which in turn exacerbates the pressures of exurbanization. Consequently, while the Task Force embraces the vision and objectives identified by the Growth Management Committee in 1996, it recommends that a number of additional actions be taken over the next ten years to preserve Marion as an affordable, diverse, and historic seaside community.

Many of the proposed actions are the primary responsibility of a single public agency, such as the Board of Selectmen, Housing Trust, or the Planning Board, although many of the actions will require the cooperation of multiple town agencies. Some of the proposed actions are specifically defined, while other proposals will require further study by the appropriate town agencies:

I. AFFORDABILITY

A. Encourage and promote the development of affordable housing for families, long-time residents, the elderly, moderate income households, downsizers, returning Marion natives, and municipal employees.

1. Create or obtaining an inventory of existing land and buildings available for affordable housing development.

Primary responsibility: Board of Selectmen, through advisement of the Open Space Committee, Housing Trust¹³

2. Explore options for gifting property and houses to the Town of Marion for affordable housing.

Primary responsibility: Housing Trust

3. Implement Marion Housing Plan, including implementation of the Marion Housing Trust.

Primary responsibility: Board of Selectmen

4. Develop an affordable mixed-use by-law and “mini-master plan” for the village center and other nodal areas using smart growth guidelines. The Nodal areas include Rt. 6 and Rt. 105, Rt. 6 and Converse Rd., Route 6 and Point Rd. and the village center. The mini-master plan and by-law should encourage “mini-village” mixed use development.

Primary responsibility: Planning Board

5. Expand Little Neck Village.

Primary responsibility: Housing Trust

6. Explore options for privately owned elderly housing, e.g. condominiums, assisted living facilities, and a nursing home that will provide a continuum of care and services, but with the stipulation that private developments must include an affordability component.

Primary responsibility: Housing Trust

¹³ This responsibility currently falls with the Board of Selectmen. However, the Housing Trust will be created at town meeting in the spring of 2006. At this time, the Housing Trust has been approved by the Board of Selectmen and is endorsed by the Housing Committee.

7. Research potential financing mechanisms to supplement affordability.

Primary responsibility: Housing Trust

8. Explore and promote coalitions to finance affordable housing through town, private developer, and non-profit ventures.

Primary responsibility: Housing Trust

9. Strengthen and prioritize cluster zoning, including multi-family/cluster zoning and mixed use zoning, including a review of existing density requirements (consider a density bonus review).

Primary responsibility: Planning Board

10. Identify and promote existing affordability programs and educate residents about these programs, (e.g., heating assistance, property tax abatements and exemptions, rental deduction on state income tax, earned income credit, etc.).

Primary responsibility: Board of Selectmen, Council on Aging, Assessor.

11. Explore options for municipal town employee housing.

Primary responsibility: Housing Trust

12. Maintain and update town website with information about town resources and programs, such as heating assistance, property tax abatements and exemptions, rental deduction on state income tax, and the earned income credit, etc.

Primary responsibility: Board of Selectmen

II. DIVERSITY

A. Maintain a business climate that promotes business diversification

1. Examine zoning mechanisms that will enhance village and waterfront business vitality.

Primary responsibility: Planning Board

2. Explore mechanisms to take advantage of marine and village businesses.

Primary responsibility: Board of Selectmen

3. Facilitate the development of bed and breakfasts.

Primary responsibility: Planning Board

4. Develop a plan for business growth and business location within the town of Marion.

Primary responsibility: Planning Board

5. Recruit and encourage “after 5:00 pm” businesses, e.g., restaurants, small retail shops, etc.

Primary responsibility: Board of Selectmen

6. Improve and expand resources to Council on Aging and other services for an aging population.

Primary responsibility: Board of Selectmen

7. Assist in the development of a business support network that will encourage Marion businesses to come together as a business association-type entity.

Primary responsibility: Board of Selectmen

III. PROTECT THE TOWN'S CHARACTER

A. Preserve quaintness and historic seaside character of Marion

1. Ensure that commercial design standards exist and/or are created to preserve the character of the town.

Primary responsibility: Planning Board

2. Designate critical areas of development and study the potential uses and designs of these areas to control future development. Planning should focus on mixed use development – affordable housing and a mix of small businesses that serve the community rather than “fly on-fly off” traffic.

Primary responsibility: Planning Board

3. Review a study of “traffic calming” especially on Route 6 and the proposed nodal areas, including alternative methods of transportation such as bike paths, single lane areas, and turn lane areas.

Primary responsibility: Planning Board

4. Get ahead of potential negative development consequences;
 - a. Develop mechanisms for preserving historic structures, including possible use of demolition delay bylaw, redefining demolition/alteration.
 - b. Slow mansionization of village by limiting size and scope of developments for consistency within area.
 - c. Enforce the 40% impervious lot coverage bylaw – for all lots, not just non-conforming ones by fixing the definition of impervious surface.
 - d. Ensure flood plain development is adequately restricted to maintain public safety.

Primary responsibility: Planning Board

5. Create village center protection district that promotes mixed use development such as marine services, marine access, small retail, and affordable housing.

Primary responsibility: Planning Board

6. Explore strategies for optimizing parking in the village.

Primary responsibility: Planning Board

7. Develop zoning and special permit to encourage marine and boating services and amenities to attract seasonal boaters.

Primary responsibility: Planning Board

8. Encourage development that provides significant public benefit, such as public marine access, that protects the economic vitality of the village center.

Primary responsibility: Planning Board

9. Study the importance of build out on taxes, roads, wastewater treatment, schools, municipal services, including the development of accurate measurement data.

Primary responsibility: Planning Board

10. Study and refine the existing build-out analysis.

Primary responsibility: Board of Selectmen

B. Create a Harbor and Waterfront Master Plan for Marion that recognizes Marion's harbor as one of the town's most valuable resources as a source of revenue, as a major recreation asset, and as a major aesthetic asset.

1. Explore successful models implemented in other coastal towns for the opening up of marine amenities to public use with an emphasis on serving Marion residents.

Primary responsibility: Marine Resources Committee

2. Reconfigure and optimize access and use of current field.

Primary responsibility: Marine Resources Committee

3. Create a community boating area that will primarily serve local residents.

Primary responsibility: Marine Resources Committee

4. Study and manage nitrogen sensitive embayment denigration and the environmental impacts of marine uses on the harbor.

Primary responsibility: Marine Resources Committee

5. Explore methods to leverage the value of waterfront property to support town needs.

Primary responsibility: Marine Resources Committee

6. Request that the Planning Board and Harbormaster examine the proliferation of docks and piers.

Primary responsibility: Marine Resources Committee

C. Preserve open space

1. Promote the management and protection of open space for preservation and for possible future town uses.

Primary responsibility: Community Preservation Commission

2. Coordinate formal meetings once or twice per year among Open Space Committee, Sippican Land Trust, Planning Board, Community Preservation Committee, and Board of Selectmen and develop a mechanism for enhanced communication between private and public land use bodies.

Primary responsibility: Community Preservation Commission

3. Create a land use plan for municipal infrastructure needs.

Primary responsibility: Board of Selectmen

4. Create more passive versus active recreational amenities for seniors and greater leisure activities for all age groups.

Primary responsibility: Board of Selectmen through Recreation Committee

D. Foster Volunteerism

1. Explore property tax credits for elderly residents who volunteer to assist in providing town services.

Primary responsibility: Board of Selectmen/Everybody

2. Promote and communicate a list of volunteer opportunities, including use of town website.

Primary responsibility: Board of Selectmen/Everybody

3. Develop communication with the business community regarding fire, and EMS, and Harbormaster volunteer issues.

Primary responsibility: Board of Selectmen/Everybody

4. Communicate better with town residents and businesses about the need for volunteers, including the increasing pressures of maintaining services without volunteers, the solicitation of possible solutions, and the potential long term expenditures, with a goal that all residents and businesses being better informed and able to make better decisions.

Primary responsibility: Board of Selectmen/Everybody

E. Enhance Relations/Communication with Tabor Academy

1. Create a joint town/gown committee on Tabor to open the lines of communication about problems, issues and opportunities facing both the Town and Tabor.

Primary responsibility: Board of Selectmen

IV. STABLE TAXES

1. Identify and examine best practices for government structure, organization, and operations with particular emphasis on:
 - a. volunteer and on-call fire, EMS, and Harbormaster operations
 - b. general government organization,
 - c. a charter commission including examination of lines of organizational and inter-governmental communication,
 - d. the Department of Public Works,
 - e. elected boards and commissions versus appointed boards and commissions,
 - f. elected versus appointive positions generally,
 - g. fiscal impact of Planning Board and zoning decisions,
 - h. regionalization

Primary responsibility: Board of Selectmen

2. Establish a town committee, board or task force to analyze all existing assets, buildings and property that owned by the town and to examine the potential reuse by other departments, including sharing or coordinated development of multi department buildings, and the possible sale of town buildings.

Primary responsibility: Capital Planning Committee

3. Ensure that needed maintenance for town facilities is budgeted and completed on a regular schedule.

Primary responsibility: Department of Public Works, Finance Committee

V. Recommendations from 1996 Growth Master Plan

The Marion Growth Management Committee submitted its *Report of Planning Recommendations to the Board of Selectmen and the Planning Board* in October of 1996. The report recommended 56 action items that included a variety of proposed zoning by-laws and other management guidelines to control future residential and business growth. The Town of Marion implemented most of these goals over the following ten years, although several recommendations remain to be implemented. Because it has been nearly ten years since the report was submitted, the Marion 2015 recommends that these remaining items be reviewed to determine if they are still relevant or if they should be rewritten to reflect changes that have occurred since 1996.

Recommendations 1 through 4 have been partly addressed in some form by the 2015 Committee in this report. A reference has been made beside each of these recommendations to highlight the relevant recommendation. Recommendation 5 was not addressed by the 2015 Committee.

1. Develop a Route 6 Plan, including zoning, mixed use mini-villages at nodal areas, and traffic calming. (see I A 4; III A 3)

Primary responsibility: Planning Board

2. Create business zoning overlays and explore village viability issues. (see II A 1; III A 5)

Primary responsibility: Planning Board

3. Create master plan for harbor. (see III B)

Primary responsibility: Board of Selectmen

4. Create design guidelines for residential and commercial development. (see III A 1)

Primary responsibility: Planning Board

5. Explore the creation of “development fees” for developers

Primary responsibility: Planning Board

5.00 OBJECTIVES AND ACTIONS MATRIX

I. Affordability

A. Encourage and Promote the Development of Affordable Housing	Responsibility	To Be Completed By
1. Create/Obtain inventory of existing land and buildings available for affordable housing development	Board of Selectmen	
2. Explore options for gifting property and houses to Town of Marion for affordable housing	Housing Trust	
3. Implement Marion Housing Plan	Board of Selectmen	
4. Develop affordable mix-use by-law and "mini-master plan"	Planning Board	
5. Expand Little Neck Village	Housing Trust	
6. Explore options for privately owned elderly housing	Housing Trust	
7. Research potential financing mechanisms to supplement affordability	Housing Trust	
8. Explore and promote coalitions to finance affordable housing	Housing Trust	
9. Strengthen and prioritize cluster zoning	Planning Board	
10. Identify and promote existing affordability programs and educate residents about these programs	Board of Selectmen, Council on Aging, Assessor	
11. Explore options for municipal town employee housing	Housing Trust	
12. Maintain and update town website with information about town resources and programs	Board of Selectmen	

II. Diversity

A. Maintain a Business Climate that Promotes Business Diversification

1. Examine zoning mechanisms that will enhance village and waterfront business vitality	Planning Board	
2. Explore mechanisms to take advantage of marine and village businesses	Board of Selectmen	
3. Facilitate the development of bed and breakfasts	Planning Board	
4. Develop a plan for business growth and business location within the town of Marion	Planning Board	
5. Recruit and encourage "after 5:00 pm" businesses, e.g. restaurants, small retail shops, etc.	Board of Selectmen	
6. Improve/Expand resources to Council on Aging and other services for aging population	Board of Selectmen	
7. Assist in the development of a business support network	Board of Selectmen	

III. Protect the Town's Character

A. Preserve Quaintness and Historic Seaside Character of Marion

1. Ensure that commercial design standards exist and/or are created to preserve the character of the town	Planning Board	
2. Designate critical areas of development and study potential uses of these areas to control development	Planning Board	
3. Review a study of "traffic calming" especially on Route 6 and proposed nodal areas	Planning Board	
4. Get ahead of potential negative development consequences:		
a. develop mechanisms for preserving historic structures	Planning Board	
b. slow mansionization of village by limiting size and scope for consistency within area	Planning Board	
c. Enforce 40% impervious lot coverage bylaw	Planning Board	
d. ensure flood plain development is adequately restricted to maintain public safety	Planning Board	
5. Create village center protection district that promoted mixed-use development	Planning Board	
6. Explore strategies for optimizing parking in the village	Planning Board	
7. Develop zoning and special permit to encourage marine and boating services/amenities to attract boaters	Planning Board	
8. Encourage development that provides significant public benefit and that protects economic vitality of village	Planning Board	
9. Study and refine the existing build-out analysis	Board of Selectmen	
10. Study the importance of build-out on taxes, roads, wastewater treatment, schools, municipal services	Planning Board	

III. Protect the Town's Character (continued)

B. Create a Harbor and Waterfront Master Plan that Recognizes Marion's Harbor as one of the Town's Most Valuable Resources

1. Explore successful models implemented in other coastal towns for opening up marine amenities for public use with an emphasis on serving Marion residents.	Marine Resources Committee	
2. Reconfigure and optimize access and use of current mooring field	Marine Resources Committee	
3. Create a community boating area that will primarily serve local residents	Marine Resources Committee	
4. Study and manage nitrogen sensitive embayment denigration and environmental impacts from marine uses	Marine Resources Committee	
5. Evaluate and manage waterfront property as a valuable asset to the town	Marine Resources Committee	
6. Ask the Planning Board and Harbormaster to examine the proliferation of docks and piers	Marine Resources Committee	

C. Preserve and Manage Open Space

1. Promote the management and protection of open space for preservation and possible future town uses	Cmnty. Preservation Committee	
2. Coordinate formal meetings once or twice per year among public and private land use bodies	Cmnty. Preservation Committee	
3. Create a land use plan for municipal infrastructure needs	Board of Selectmen	
4. Create more passive versus active recreation for seniors and greater leisure activities for all age groups	Board of Selectmen through Recreation Committee	
5. Assign stewardship responsibility to manage and regulate open space in Marion	Board of Selectmen	

D. Foster Volunteerism

1. Explore property tax credits for elderly residents who volunteer to assist in providing town services	Board of Selectmen, Everybody	
2. Promote and communicate a list of volunteer opportunities, including use of town website	Board of Selectmen, Everybody	
3. Develop communication with business community regarding fire, EMS, and Harbormaster volunteer issues	Board of Selectmen, Everybody	
4. Communicate better with town residents and businesses about the need for volunteers	Board of Selectmen, Everybody	

E. Enhance Relations/Communication with Tabor Academy

1. Create a joint town/gown committee on Tabor to open the lines of communication	Board of Selectmen	
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F. Strengthen Emergency Preparedness

1. Create a town committee to improve the coordination of emergency preparedness	Board of Selectmen	
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IV. Stable Taxes

1	Identify and examine best practices for government structure, organization, and operations with emphasis on:		
	a. volunteer and on-call fire, EMS, and Harbormaster	Board of Selectmen	
	b. general government organization	Board of Selectmen	
	c. a charter commission including examination of lines of inter-organizational and inter-governmental communication	Board of Selectmen	
	d. the Department of Public Works	Board of Selectmen	
	e. elected boards and commissions versus appointed boards and commissions	Board of Selectmen	
	f. elected versus appointive positions	Board of Selectmen	
	g. the fiscal impact of Planning Board and zoning decisions	Board of Selectmen	
	h. opportunities for regionalization	Board of Selectmen	
2.	Establish a town committee, board or task force to analyze all existing assets, buildings and property owned by the town to examine the potential reuse by other departments, sharing or coordinated development of multi department buildings, and possible sale of town buildings	Capital Planning Committee	
3.	Ensure that needed maintenance is budgeted and completed on a regular schedule	Department of Public Works, Finance Committee	

V. Items from 1998 Growth Management Plan

1.	Develop a Route 6 Plan, including zoning, mixed use mini-villages at nodal areas, and traffic calming	Planning Board	
2.	Create business zoning overlays and explore village viability issues	Planning Board	
3.	Create master plan for harbor	Board of Selectmen	
4.	Create design guidelines for residential and commercial development	Planning Board	
5.	Explore the creation of “development fees” for developers	Planning Board	

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